

MARINE M O N E Y

24th Annual Norway Ship & Offshore Finance Forum

Thursday, May 23, 2024
Hotel Continental, Oslo, Norway

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8:15 Registration & Networking Coffee

9:15 Conference Opening Remarks

Conference Chairman: Axel Stove-Lorentzen, Advisor to the Board, NorthCape

9:25 Market Outlook – Charter Rates and CO2

Arlie Sterling, President, Marsoft

**9:45 1:1 with Joakim Hannisdahl, Founder & CEO,
Gersemi Asset Management**

Gersemi Shipping Fund's unaudited NAV currently stands at a new all-time-high at indexed 135, 13% YTD and +35% since inception (41% CAGR). Gersemi Shipping Fund's annualized Sharpe Ratio is 5.4x since inception in July 2023. The return on Hannisdahl's Shipping Investments since Mid-2017 is 613%.

Christopher Vonheim, Host of the Vonheim Podcast

**10:15 KEYNOTE ADDRESS: *Securing Civilian Shipping Through
War & Crises***

Svein Ringbakken, CEO, The Norwegian Shipowners' Mutual War Risks Insurance Association (DNK)

10:45 Networking Coffee

**11:30 Where are Financiers & Investors Seeing Opportunities to
Deploy Capital**

Sakis Voudris, Director, Neptune Maritime Leasing Ltd

Malcolm Eddington, Managing Director, Commodity Markets and Finance, Macquarie Group

Roger Aamillom, Director, Credit Agricole

James Stove-Lorentzen, Managing Director & Partner, NorthCape

Ilias Katsoulis, Head of Shipping, Deutsche Bank

Moderator: Ian Mace, Global Head of Maritime and Offshore Finance, Stephenson Harwood

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For more information about the forum, visit www.marinemoney.com

12:05 YardScore: From ESG Ambitions to Real Impact

Transparency empowers shipowners, banks, and investors to make well-informed decisions and drive improvements in ship repair and recycling yards.

Elin Saltkjel, Head of Technical and HSEQ, Grieg Green in conversation with:

Yannis Litinas, Partner (solicitor), Simonsen Vogt Wiig

12:20 Navigating in a Strong Market

Public owners discuss how they view and what to do in today's strong markets. From capital raising and where to list, to dividends, from newbuilds to second hand buys, from consolidation to sustainability and more, owners share their view on key issues in today's market.

Kristian Sørensen, CEO, BW LPG

Randi Navdal Bekkelund, CFO, Avance Gas

Peder Simonsen, CFO, Golden Ocean

Lars Christian Skarsgård, CEO, Belships

Moderator: Fredrik Dybwad, Shipping Equity Research, Fearnley Securities

12:55 Networking Luncheon in Restaurant Caroline

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2:15 The Resurgent Offshore Oil & Gas Sector

Ingolf Gillesdal, VP Corporate Finance and Investor Relations, Dolphin Drilling

Eric Stousland, Manager, Corporate Finance and Investor Relations, BW Offshore

James Crothers, Investor Relations Officer, Odfjell Drilling

Jesús Llorca, Executive Vice President & Chief Financial Officer, Seacor Marine

Titus de Greeff, Head of Corporate Finance Western Hemisphere, Yinson Production

Moderator: Truls Olsen, Head of Research, Fearnley Securities

2:50 "Into the Blue again" – OMP from HitecVision to EnTrust Global Blue Ocean Group

EnTrust Global's Blue Ocean has grown to become a major player in maritime finance since their inception in 2016. In 2021 they completed the take-over of Maas Capital from ABN Amro Bank; and in April 2024 they expanded further by completing the take-over of OMP from HitecVision. What's the "OMP story" that made EnTrust Global interested?

Ivar Hansson Myklebust, Chief Executive Officer, OMP Management AS in conversation with:

Anders Schau, Managing Director & Partner, NorthCape

3:10 Financing the Future: Balancing Growth and Returns in Offshore Wind

In recent years, there have been public examples of growth generating solid returns for investors, and also examples of dilutive growth.

- *There is plenty of growth to pursue in offshore wind, but how to do it responsibly while ensuring attractive risk-adjusted returns?*
- *Among investors in shipping & offshore, there is sometimes an attitude that offshore wind is a low return business. Is that a mistaken perception?*
- *How does financing offshore wind assets differ from financing traditional shipping segments? What risks are lenders most concerned with when providing finance?*
- *How should investors approach a segment with many uncertainties (economic, technological, political)? Are higher returns required to gain investment, and does this contribute to the imbalance in the supply chain?*

Ketil Arvesen, Vice President, Fred. Olsen Ocean

Ingrid Due-Gundersen, Group CEO, Havfram

Jan Eyvin Wang, EVP, New Energy, Wilhelmsen Group / Board Member, Edda Wind

Moderator: Turner Holm, Managing Director, Investment Banking, Clarksons Securities

3:40 Shipping & Offshore Investment Summit: Where Best to Deploy Capital Today

There are many different strategies for investing in the global shipping and offshore industries. In this session, active market players share their views.

Pål Magnussen, President & CEO, AMSC

Wilhelm Magelssen, Partner & Fund Manager, NRP Maritime Asset Management

Bob Burke, Partner & CEO, Ridgebury

Magnus Halvorsen, Partner, WMC Capital

Andreas Røde, Chief Executive Officer, Ocean Yield AS

Moderator: James Stove-Lorentzen, Managing Director & Partner, NorthCape

4:15 Closing Remarks

Cocktail Reception Graciously sponsored by
(Reception venue details to follow separately closer to the event date.)



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