



TALKING HEDGE



# THE POWER OF ALTERNATIVES: A NEW ERA IN ALIGNMENT OF INTERESTS

JUNE 5-6, 2019, THE WESTIN HARBOUR CASTLE, TORONTO

## CONFERENCE PROGRAM



# CONFERENCE SPONSORS







Welcome to our program: ***The Power of Alternatives: A New Era in Alignment of Interests***. Customization has taken center stage and is clearly here to stay. Institutional investors are in need of bespoke strategies, products, and operational implementation for their portfolios. Answering the call, the alternative investment industry is providing highly innovative, tailor-made solutions. We're pleased that you are with us for a great day of discussions about this new era of alignment of interests, strategic relationships, and customization.

Talking Hedge is honored to assemble such an exemplary speaking faculty to spark constructive conversations between leading institutional investors, managers, and solutions providers. Our goal is to encourage deep discussions and worthwhile relationships.

Many thanks to our participants for their enthusiasm to share their insights on today's most beneficial client-driven solutions. Their expert perspectives are sure to inspire some great conversations.

Special thanks to our lead partner **Lyxor Asset Management Inc.** for steering us to Toronto and for their thoughtful contributions to today's program.

This event would not be possible without the support of our partner firms including: **ARP Investments, Bodhi Research Group, Celernus Investment Partners, Capital Fund Management, Coquest Advisors, Emso Asset Management, Innocap, Martlet Asset Management, Metori Capital Management, Mulvaney Capital Management, Napier Park Global Capital, and O'Brien Investment Group.**

And a special shout out to **Coquest Advisors** for sponsoring our Welcome Reception and Closing Reception, and to **O'Brien Investment Group** for sponsoring our Networking Breaks.

We also are grateful to our strategic partners, **AIMA, CAASA, and CAIA**, and thrilled to welcome CAIA CEO Bill Kelly as our Opening Keynote Speaker!

We hope you enjoy today's program and networking!

Kind regards,

Meg Bode  
Founder



# CONFERENCE PROGRAM

## WEDNESDAY, JUNE 5

5:30 – 7:00

**TALKING HEDGE WELCOME RECEPTION FOR ALL REGISTRANTS**

## THURSDAY, JUNE 6

7:30-8:30

**NETWORKING BREAKFAST**

8:30-8:45

**Welcome**

8:45-9:30

**Opening Keynote: *Hedge Funds Coming of Age: Opportunities, Challenges and Misconceptions***

Presenter: William J. Kelly  
Chief Executive Officer, CAIA Association

9:30-10:15

**Co-Investments: Capturing Alpha in an Era of Customization**

Moderator: Jean-François Tormo, CAIA  
Senior Portfolio Manager, Head of Global Portfolio Solutions – US, Lyxor Asset Management Inc.

Panelists: Kieran Cavanna  
Partner, Old Farm Partners

James Garvey, CFA  
Credit Opportunities Portfolio Manager, Emso Asset Management

Serhan Secmen  
Partner, Head of US CLO Management & Investments, Napier Park Global Capital

10:15-10:45

**Networking Break**

10:45-11:45

**Beyond Trend and Carry: Seeking Alpha in FX and Managed Futures**

Moderator: Mark Shore  
Director of Educational Research, Coquest Advisors

Panelists: Michael Erario, CFA  
Director, Investor Relations, Capital Fund Management

Nicolas Gausse  
Chief Executive Officer and Co-Chief Investment Officer, Metori Capital Management

Michael Johannes, PhD  
Portfolio Manager, O'Brien Investment Group

Paul Mulvaney  
Chief Executive Officer & Chief Investment Officer, Mulvaney Capital Management

11:45-12:30

**Risk Premia: Getting True Diversification with Liquid Investments**

Moderator: Jessica Nicosia  
Vice President, Wilshire Associates

Panelists: Ludger Hentschel, PhD  
Founding Partner, Investments, ARP Investments

Christophe L'Ahelec, CFA  
Senior Principal, External Managers, Capital Markets, Ontario Teachers' Pension Plan

Judith Posnikoff, PhD  
Managing Director, Martlet Asset Management



12:30-2:00	<b>Networking Lunch</b>
2:00-2:15	<b>Networking Transition - Return to Ballroom</b>
2:15 – 3:00	<b>Keynote Presentation:</b> <b>Do <i>YOUR</i> Alternative Data Know Something Wall Street and Government Data Do Not?</b> Presenter:     Apurv Jain Visiting Researcher, Harvard Business School
3:00-3:30	<b>Networking Break</b>
3:30-4:15	<b>Structuring Operational Alpha to Enhance Customization Possibilities</b> Moderator:     Graham Jones Director, Scotia Capital Panelists:       Christina Mah Darcy, CPA, CA Director, Investment Operations, Finance, Analytics & Risk, Canada Pension Plan Investment Board Jonathan Planté, CAIA Manager, Business Development & Investor Relations, Innocap Wei Xie Director, Strategic Relationships & Innovation, Office of the CIO, OPTrust
4:15-5:15	<b>ESG Matters: Raising the Bar in Governance</b> Moderator:     Ela Karahasanoglu, CFA, CAIA Visiting Researcher, Bodhi Research Group, Co-Chair, CAIA Toronto Panelists:       Ranjan Bhaduri, PhD, CFA, CAIA Chief Executive Officer, Bodhi Research Group Kurt Hagerman Chief Operating Officer & Chief Compliance Officer, Celernus Investment Partners Inc. Martha Tredgett Partner, Belco/LGT Capital Partners
5:15-6:30	<b>Closing Networking Reception</b>



# SPEAKER BIOS



## **RANJAN BHADURI, PHD**

*Chief Executive Officer, Bodhi Research Group*

Dr. Ranjan Bhaduri is the Founder, President & CEO of Bodhi Research Group. Bodhi Research Group is focused on research and education in the alternative investments industry. Dr. Bhaduri has extensive experience in hedge fund research, hedge fund factorization, portfolio management, and due diligence (investment, operational, and structural). Dr. Bhaduri has designed and implemented an institutional due diligence and research program. Dr. Bhaduri's experience includes being on an Investment Committee at Morgan Stanley where he conducted due diligence and helped design customized portfolios of Alternatives. Earlier, he was at a Canadian Fund of Funds, and at a multi-billion dollar capital management firm where he was involved in all aspects of its fund of hedge funds and structured finance business. He has also worked with two major Canadian investment banks in the Financial Strategy Consulting Group and in Global Risk Management & Control, respectively. Dr. Bhaduri has a winning track record of leadership and training. Several of his former analysts and interns have gone on to have successful careers and have held positions at prestigious organizations, including the following firms: Ontario Teachers' Pension Plan, Goldman Sachs, J.P. Morgan, Wisconsin Alumni Research Foundation, Securities Exchange Commission (SEC), Neuberger Berman, and Crabel Capital Management. Dr. Bhaduri has held an advisory role at the East-West Center, a leading think tank on the Asia-Pacific region. He has taught finance and mathematics at several universities and lectured on Derivatives for the Montreal Exchange. Dr. Bhaduri has published papers on and been invited to speak worldwide regarding hedge fund issues, and advanced portfolio and risk management techniques. Dr. Bhaduri was invited by the CME to be part of a special delegation that met with regulators in Beijing and Taipei to discuss hedge fund issues. Dr. Bhaduri holds both the CFA and CAIA charters. He is a member of the American Mathematical Society, the Mathematical Association of America, the Toronto CFA Society, and PRMIA. Dr. Bhaduri previously served as a member of the All About Alpha Editorial Board and has previously served on the CAIA Chicago Chapter Executive and is currently a CAIA Toronto Chapter Executive. Dr. Bhaduri previously served on the Board of Directors of AIMA Canada, co-chair of AIMA Canada Managed Futures Committee, and on the AIMA Global Research Committee.



## **KIERAN CAVANNA**

*Partner, Old Farm Partners*

Kieran Cavanna is the Co-Founder and CIO of Old Farm Partners. Old Farm is a hedge fund allocation firm focusing on small and mid-sized hedge funds, as well as co-investment opportunities. Prior to Old Farm, Mr. Cavanna worked at Soros Fund Management where he served as the Head of the External Manager Selection team. Mr. Cavanna and his team performed due diligence on and allocated to a select group of hedge funds that deployed a wide variety of hedge fund strategies. Prior to Soros, Kieran was a Partner and the Head of Research at Titan Advisors, a \$5b fund-of-hedge funds. In total Mr. Cavanna has allocated to hedge funds for 15 years. Mr. Cavanna started his financial career at KPMG Consulting as Senior Analyst. Mr. Cavanna graduated from the University of Richmond with a BA and received an MBA from Vanderbilt University.



## **CHRISTINA MAH DARCY, CPA, CA**

*Director, Investment Operations, Finance, Analytics & Risk, Canada Pension Plan Investment Board*

Christina has over 20 years of experience in the Financial Services Industry in various roles including external audit, internal audit, financial reporting, operational due diligence and most recently investment operations. Christina currently manages a team of 40 operational professionals supporting the Canada Pension Plan Investment Board's public markets trading programs. Christina's teams consist of hedge fund operations, trade settlements, managed account platform operations, tax research, data operations, corporate actions and overall deal support. Christina also sits on the Board of Directors for CPPIB's managed account platform. Prior to joining CPPIB, Christina earned her CPA and CA designations as an audit manager at Ernst & Young LLP. Subsequently, Christina joined the Ontario Teachers' Pension Plan within their internal audit function and then moved to Russell Investments to act as their Controller.





**MICHAEL ERARIO, CFA**

*Director, Investor Relations, Capital Fund Management*

Michael is a Director in CFM's North America Investor Relations team. Michael joined the New York office in 2011, overseeing relationships with the firm's institutional investors and consultants across the Eastern U.S. and Canada. Prior to CFM, Michael spent four years at Two Sigma Investments as a member of the Investor Relations team. He earned a B.A. in Psychology from Marist College and is a CFA charterholder.



**JAMES GARVEY, CFA**

*Credit Opportunities Portfolio Manager, Emso Asset Management*

Jim began his career as a Latin American corporate bond research analyst with Smith Barney in 1993, after which he joined Bancamer Securities and managed a portfolio of Emerging Market corporate bonds. In 1996, he joined Santander Investment Securities as head of Latin American corporate bond research, and eventually also ran its corporate bond trading business. His most recent position was as Managing Director and Head of Latin American Distressed and Illiquid Trading at Bank of America Merrill Lynch, where he worked for 14 years beginning in 2000. During this time, the desk traded distressed products, including single name special situations, bulk loan portfolios, sovereign debt, NPL portfolios, and other related products. He holds an MBA from The American University, a B.A. in business administration from St. Michael's College, and is a Chartered Financial Analyst.



**NICOLAS GAUSSEL**

*Chief Executive Officer and Co-Chief Investment Officer, Metori Capital Management*

Nicolas has over 20 years of experience in finance, including 15 years in asset management. Prior to founding Metori, he was Lyxor Asset Management's CIO, overseeing 100+ portfolio managers, researchers and financial engineers. Nicolas holds an engineering degree from French Ecole Centrale de Paris, and a PhD in Economics from Paris La Sorbonne. He has been a quantitative finance lecturer in different master programs and contributed to various academic articles.



**KURT HAGERMAN**

*Chief Operating Officer & Chief Compliance Officer, Celernus Investment Partners Inc.*

Kurt is the CCO & COO with Celernus Investment Partners. Previously, he was a Vice President and Head of Operations at State Street, the COO & CFO of Red Jacket Asset Management, and a Director at Castle Hall Alternatives. Kurt's industry experience was built from a 15 year career at Citco Fund Services, in roles that included Managing Director at Citco Toronto, Managing Director of Citco Bahamas and Operations Manager in their Cayman Islands office. Prior to joining Citco Toronto as Manager in 1996, Kurt worked at Monsanto after becoming a Chartered Accountant with Ernst & Young in Canada.



**LUDGER HENTSCHEL, PHD**

*Founding Partner, Investments, ARP Investments*

Ludger Hentschel joined ARP Investments as Founding Partner, Investments, based in New York. Ludger has over 20 years of experience in quantitative research and investing. Prior to joining ARP Investments, he was Managing Director of Analytical Research at MSCI, based in New York, responsible for leading MSCI's research in global multi-asset-class risk models, including alternative investments, asset allocation and macroeconomic risk, and liquidity risk. Before joining MSCI, Ludger was head of quantitative research and asset allocation for the hedge fund group at Investcorp. Previously, he headed quantitative equity research at New York Life Investment Management, was an Associate Professor of Finance at the University of Rochester and served as an Economist for the Board of Governors of the Federal Reserve System. Ludger earned a BS in Mechanical Engineering from Yale and a PhD in Economics from Princeton. He has published articles in leading academic finance journals, served as an associate editor for the Journal of Financial Economics, and is a frequent speaker at financial seminars and conferences. He serves on the Board of Directors of the Lester B. Pearson College of the Pacific US Foundation.

**APURV JAIN**

*Visiting Researcher, Harvard Business School*

Apurv is a visiting researcher at HBS focusing on applying AI and alternative data to better measuring and predicting the macroeconomy. Before HBS, Apurv led MSFT in applying AI and exploring uses of alternative data for investing purposes as the co-founder and finance lead of MSFT Econ Measurement Group (MSEM.) From 2014 to 2018, he helped MSEM grow into a 10-person team of ML experts, researchers and investment professionals with \$100 mm AUM. The team also established research partnerships with central banks and top asset managers. Apurv speaks regularly at various industry and academic conferences and has published papers in computer science and economics. His previous experience includes managing MSFT's \$3B Credit book, a senior researcher role at Bridgewater Associates, and FX research and trading at Deutsche Bank. He has an MBA from University of Chicago, a master's degree in Industrial Engineering from Georgia Tech, and has completed his coursework towards a Financial Economics PhD at MIT. Apurv writes an opinion blog for CNBCTV18.com and, also, acts as an advisor to startups in the space

**MICHAEL JOHANNES, PHD**

*Portfolio Manager, O'Brien Investment Group*

Dr. Michael Johannes, Portfolio Manager, has served as the Director of Fundamental and Quantitative Research at OBIG since 2015 and as PM of the Quantitative Global Macro Futures Program since July 2017 (since inception). He has served in a similar capacity for Clarke Capital Management (an affiliated company) since 2012. Dr. Johannes con-currently serves as a Professor of Finance and Economics at Columbia University's Graduate School of Business. He has been at Columbia since receiving his Ph.D. in Economics from the University of Chicago in 2000.

**GRAHAM JONES**

*Director, Scotia Capital*

Graham joined Scotia Prime Brokerage as Director of Sales in 2018 to focus on global cash and swap financing for Canadian Alternative Mutual Funds. He has a 20-year track record of institutional sales success with a focus on international equity and credit finance, capital introduction, hedge fund consulting and electronic trading. Prior to Scotia, Graham worked at Credit Suisse where he was head of coverage in Canada, providing cash and D1 financing to both pension plans and hedge fund managers. Graham is a Chartered Investment Manager (CIM) and is a graduate of McGill University. He lives in Toronto with his visual-artist wife and two sons. When not sailing on Lake Ontario, or biking in the Don Valley, he is vegetable gardening at his farm outside of Creemore, Ontario.



**ELA KARAHASANOGLU, CFA, CAIA**

*Visiting Researcher, Bodhi Research Group, Co-Chair, CAIA Toronto*

Ela Karahasanoglu is an independent Advisor to pension plans, family offices and other institutional investors globally providing portfolio construction, risk management, asset management and asset allocation advice, particularly in the absolute return/alternative investments space. Previously, Ela was a Managing Director, Multi-Asset Strategies at Investment Management Corporation of Ontario (IMCO), an entity established recently by the Ontario government to manage the assets of Ontario based non-corporate plans. IMCO currently oversees c.\$60bn of assets across its first two clients, Ontario Pension Board (OPB) and Workplace Safety and Insurance Board (WSIB). At IMCO, Ela oversaw the \$8.5bn Multi-Asset Strategies portfolio, comprising risk parity and absolute return strategies, including hedge funds as well as non-hedge fund mandates. She also led the investment team that managed WSIB's \$35bn portfolio. Prior to the transition of the management of WSIB's assets and investment team to IMCO in July 2017, Ela had a similar role at WSIB. Before joining WSIB in 2016, Ela was the Vice President of Currency and Asset Allocation team at CIBC Asset Management, responsible for currency management, asset allocation, and absolute return strategies. Before that, Ela was a Principal and Senior Manager Research Consultant in the Alternatives team within Mercer, covering a broad set of absolute return and hedge fund strategies, including currency, managed futures, commodities, global macro, multi-strategy, risk parity and multi-asset strategies. Ela was previously the Head of Research and Trading for six years at a New York-based quantitative macro hedge fund and prior to that worked in the areas of credit derivatives and asset management at Merrill Lynch, New York. Ela started out her career as a currency and bond trader in Turkey. She also worked in Germany as a liaison between the European Union and the Turkish Ministry of Finance. Ela has over 20 years experience in the investment industry with over 13 years dedicated to research, trading and portfolio management in the absolute return and hedge fund space. Ela is a frequent industry speaker with various publications and podcasts available online and she has recently won the well-respected Institutional Investor Hedge Fund Rising Star Award. Ela holds a Master of Business Administration from Georgetown University. She has been a CFA charterholder since 2002 and a CAIA charterholder since 2010. Ela serves on CAIA's Gender Diversity Advisory Board and is also the Co-Head of CAIA's Toronto Chapter.

**WILLIAM J. KELLY**

*Chief Executive Officer, CAIA Association*

William (Bill) J. Kelly is the CEO of the CAIA Association. Bill has been a frequent industry speaker, writer, and commentator on alternative investment topics around the world since taking the leadership role at the CAIA Association in January 2014. Previously, Bill was the CEO of Boston Partners and one of seven founding partners of the predecessor firm, Boston Partners Asset Management which, prior to a majority interest being sold to Robeco Group in Rotterdam in 2002, was an employee-owned firm. Bill's career in the institutional asset management space spans over 30 years where he gained extensive managerial experience through successive CFO, COO and CEO roles.

**CHRISTOPHE L'AELEC, CFA**

*Senior Principal, External Managers, Capital Markets, Ontario Teachers' Pension Plan*

Christophe L'Ahelec is a Senior Principal in the Capital Markets department, at Ontario Teachers' Pension Plan Board where he is responsible for the portfolio construction and risk management of the external manager portfolio. Prior to that he was a quantitative analyst and assistant portfolio manager at Mignon Genève SA/Alpstar Asset Management, in Switzerland, where he took part in the creation and portfolio management of a European systematic market neutral fund. Christophe is a graduate engineer in Finance and Applied Mathematics from the Ecole Nationale Supérieure d'Informatique et de Mathématiques Appliquées de Grenoble, France and holds the Chartered Financial Analyst® designation.



**PAUL MULVANEY**

*Chief Executive Officer & Chief Investment Officer, Mulvaney Capital Management*

Paul Mulvaney founded Mulvaney Capital in 1999 and continues to act as the firm's CEO and CIO. Mulvaney Capital's Global Diversified Program seeks to deliver high absolute returns in rising and falling markets. The Program invests in futures contracts linked to a diverse range of commodities and financial assets listed on regulated exchanges around the world. It takes a long-term approach to capturing trends in order to reduce the risk of being shaken out by short term price fluctuations. Trading is completely systematic and driven by objective price data. Prior to founding Mulvaney Capital, Mr Mulvaney held posts in derivatives and foreign exchange trading at Midland Montagu, Bankers Trust Company, NatWest Markets and Merrill Lynch. At Merrill Lynch he managed several of the firm's major options portfolios, including Global Foreign Exchange Options and Exotic Commodity Options. Paul studied Computer Science and Mathematics at Manchester University, graduating with a First Class Honours degree. He completed the Management Science program at Imperial College London, earning an MSc with Distinction.

**JESSICA NICOSIA**

*Vice President, Wilshire Associates*

Jessica Nicosia is a Vice President at Wilshire Funds Management. She assists in developing Wilshire's robust alternatives offering, including risk premia and hedge fund managed accounts, supporting the firm's efforts to identify and provide customized alternative investment solutions to financial intermediaries and institutions globally. Jessica has 15+ years of experience in the alternative investment industry. Prior to joining Wilshire Associates, she held roles with a focus on marketing quantitative hedge funds at R. G. Niederhoffer Capital Management, Vegasoul and J.E. Moody & Company.

**JONATHAN PLANTÉ, CAIA**

*Manager, Business Development & Investor Relations, Innocap*

Jonathan Planté is Manager of Business Development and Investor Relations at Innocap, which he joined in 2013. In addition, he currently lectures at HEC Montréal, where he teaches hedge funds to graduate students. During his 10 years in the alternative investment industry, M. Planté held various positions in both Europe and North America. His qualifications include a graduate degree in Finance from HEC Montréal, a master's degree in international business development from EM Lyon group as well as the CAIA designation.

**JUDITH POSNIKOFF, PHD**

*Managing Director, Marlet Asset Management*

Judith Posnikoff is a Managing Director at Martlet Asset Management, LLC. Her responsibilities include being the Head of Risk Management and Chief Compliance Officer. Judy was a founding partner at PAAMCO where she was involved in all aspects of the firm's investment process throughout the years from identifying investment opportunities to working on portfolio construction and risk management. Judy has authored numerous publications in the area of alternative investments and has taught at the University of California, Riverside and Irvine and at California State University, Fullerton. Judy was a member of the founding board of directors of the Association of Women in Alternative Investing (AWAI) and is on the global boards of 100 Women in Finance and the CAIA Foundation. She also chairs the scholarship committee of the 100 Women in Finance Institute.



**SERHAN SECMEN**

*Partner, Head of US CLO Management & Investments, Napier Park Global Capital*

Serhan Secmen is a Partner and Portfolio Manager of the CLO Investments Strategy at Napier Park Global Capital ("Napier Park"). Napier Park separated from Citigroup's alternative investment arm, Citi Capital Advisors ("CCA"), in February 2013. Prior to joining Citi Capital Advisors in August 2008, Serhan was a CLO trader at Lehman Brothers. Prior to his post at Lehman Brothers, he spent several years in Texas as a project manager focusing on special project financing. During his tenure at Napier Park, Serhan has assisted in the development of multiple propriety analytics systems and has been influential in the various strategies and methodologies for analyzing CLOs and other structured products. Since 2006, Serhan has also been involved in various industry forums and networks, including the investor roundtables for Moody's, S&P, and Fitch Ratings. He frequently appears as a speaker at multiple industry conferences and panels. Serhan holds an MBA degree from Wharton School of Business, an MS degree from Texas A&M University, and a BS degree from Bogazici University in Turkey.

**MARK SHORE**

*Director of Educational Research, Coquest Advisors*

Mark Shore, Director of Educational Research at Coquest Advisors LLC, has more than 30 years of experience in alternative investments, publishes research, consults on alternative investments and conducts educational workshops. Mr. Shore is also an Adjunct Professor at DePaul University's Kellstadt Graduate School of Business in Chicago where he teaches a managed futures / global macro course. He is a board member of the Arditti Center for Risk Management at DePaul University. Mr. Shore is a frequent speaker at alternative investment events. He is a contributing writer for several global organizations including the Eurex Exchange, Cboe, Swiss Derivatives Review, ReachX, MicroCap Review, and Seeking Alpha. Prior to Coquest Advisors, Mr. Shore founded Shore Capital Research, a research/ consulting firm for alternative investments. Prior to Shore Capital, Mr. Shore was Head of Risk for Octane Research Inc (\$1.1 billion AUM), where he was responsible for quantitative risk management analysis and due diligence of Fund of Funds. He chaired the Risk Management Committee and was a voting member of the Investment Committee. Prior to joining Octane, he was the COO of VK Capital Inc, a wholly owned Commodity Trading Advisor unit (\$300 million AUM) of Morgan Stanley. Mr. Shore provided research and risk management expertise on portfolio construction, product development, and business strategy. He received his MBA from the University of Chicago and is currently a doctoral candidate at DePaul University.

**JEAN-FRANÇOIS TORMO, CAIA**

*Senior Portfolio Manager, Head of Global Portfolio Solutions - US, Lyxor Asset Management Inc.*

Jean-François Tormo joined Lyxor S.A.S. in 2004 and since 2009 has been part of Lyxor Asset Management Inc. ("Lyxor Americas") in charge of launching and managing fund of funds and providing advisory services on alternative investments. Before joining Lyxor S.A.S., Mr. Tormo worked at BNP Paribas Arbitrage within the Fund Derivatives Structuring Team, where he was in charge of secondary trading for respective funds. He also worked at Credit Lyonnais within the Interest Rate Derivatives Team and was in charge of product pricing for plain vanilla and exotic derivatives. Mr. Tormo holds a Masters' Degree in Economics, Banking, and Finance (D.E.A., Monnaie Finance Banque) from the University of Paris II Panthéon-Assas, and a Master's Degree in Finance (Maîtrise Sciences de Gestion option Finance) from the University of Paris Dauphine. He is a Chartered Alternative Investment Analyst Association (CAIA) charterholder.

**MARTHA TREDGETT**

*Partner, Belco/LGT Capital Partners*

Ms. Tredgett (Canadian) has over 29 years of experience in the investment business combining investment banking, equity capital markets and capital development. Before joining LGT Capital Partners in 2009 to lead LGT's business development in North America, she served as a Managing Director for JP Morgan in Toronto, conducting strategic capital development for alternative asset managers. Prior to 2002, Martha was Vice-President & Director at a boutique investment dealer in Toronto; CEO & President of Cape Incorporated, involved in venture financing for small companies; and previously spent ten years on Wall Street, as Director at Union Bank of Switzerland (UBS) in equities at UBS in London & New York (1995-1998), and Vice President at Credit Suisse First Boston between London, Paris & New York (1990-1995), involved in both US and international equity market issuance. Ms. Tredgett earned a post-graduate degree in Business (D.B.S.) with Merit in 1990 from the London School of Economics and a Bachelor of Commerce (B. Comm.) in International Business and Entrepreneurship from McGill University in 1989. She has served on the board of the SOHO Partnership, and the Advisory Board of the Faculty of Management at McGill University. She is currently on the Finance & Investment Committee for the Royal Ontario Museum, Steering Committee for CAMH (the Centre for Addition and Mental Health) annual gala and The Giving Circle. She speaks English and French.



**WEI XIE**

*Director, Strategic Relationships & Innovation, Office of the CIO, OPTrust*

Wei Xie is a Director in Strategic Relationships & Innovation (SRI) team at OPTrust, one of Canada's largest pension funds with assets of \$20 billion and investment professionals in Toronto, London and Sydney. Wei leads the SRI team in the management of the external public markets program focusing on the development of a concentrated set of strategic partnerships. Wei held various progressively senior positions at OPTrust. Prior to this, Wei was the Chief-of-Staff to the Chief Investment Officer, when he supported and advised the CIO in his day-to-day management of OPTrust's Investment Division. Prior to that, he served as an Investment Strategist for the Global Investment Strategy Group, and an Associate Portfolio Manager within the Private Markets Group. Wei earned a Bachelor of Business Administration degree from Wilfrid Laurier University in Waterloo, Canada.



# CONFERENCE ATTENDEES

## FINAL

Zachary Appleman  
Vice President of Business  
Development, North America  
ISAM  
Boca Raton, FL USA

Josh Barkhordar  
Director, Client Development &  
Sales - Buyside  
CME Group  
New York, NY USA

Ranjan Bhaduri, PhD  
Chief Executive Officer  
Bohdi Research Group  
Toronto, ON Canada

Colby Borders  
Director, Alternative  
Investment Marketing  
CME Group  
Chicago, IL USA

Marianna Bracco  
Director  
Citi  
New York, NY USA

James Burron  
President  
CAASA - Canadian Association of  
Alternative Strategies & Assets  
Toronto, ON Canada

Oswaldo Canavosio  
Principal  
Episteme Capital Partners (US), LLC  
Rye Brook, NY USA

Kieran Cavanna  
Partner  
Old Farm Partners  
New York, NY USA

Caroline Chow  
Vice President  
CAASA  
Toronto, Ontario Canada

Nicholas Clark  
Intern  
Ontario Teacher's Pension Plan  
Toronto, ON Canada

John Dallas  
SFO  
Carrera Family Office  
Toronto, ON Canada

Darcy Dayment  
Due Diligence & Advisory  
Ontario Teachers' Pension Plan  
Toronto, ON Canada

G. Maxwell Eagye  
Managing Director  
Coquest  
Dallas, TX USA

Aiman El-Nahas  
Fund Manager,  
Fixed Income and Credit  
Ontario Power Generation  
Toronto, ON Canada

Michael Erario  
Executive Director, Investor Relations  
Capital Fund Management  
New York, NY USA

Gerry Fields  
President and General Counsel  
Cornerstone Group  
Toronto, ON Canada

Marc Forgione  
Associate Director  
Scotiabank  
Toronto, ON Canada

Jennifer Fortino  
Director  
Cboe Global Markets  
Chicago, IL USA

Monica Fuentes  
Portfolio Manager  
O'Brien Investment Group  
Chicago, IL USA

James Garvey  
Credit Opportunities  
Portfolio Manager  
Emso Asset Management  
New York, NY USA

Nicolas Gausse  
Chief Executive Officer & Co-Chief  
Investment Officer  
Metori Capital Management  
Paris France

(please note: this does not reflect total delegates as some opt out of being on the printed list)



# CONFERENCE ATTENDEES

## FINAL

Kurt Hagerman  
CCO & COO  
Celernus Investment Partners Inc.  
Burlington, ON Canada

Jarred Harwitt  
Vice President  
Napier Park Global  
New York, NY USA

Ludger Hentschel  
Founding Partner, Investments  
ARP Investments  
New York, NY USA

Larry Howell  
Director  
Howell Family Trust  
Oklahoma City, OK USA

Jamie Hynes  
Director, Business Development  
S&P Global  
Toronto, ON Canada

Apurv Jain  
Visiting Researcher  
Harvard Business School  
Boston, MA USA

Michael Johannes  
Portfolio Manager  
O'Brien Investment Group  
New York, NY USA

Graham, PW Jones  
Director  
Scotia Capital  
Toronto, ON Canada

Ela Karahasanoglu  
Visiting Researcher  
Bodhi Research Group  
Toronto, Ontario Canada

Adam Kelly  
Head of Execution Services  
Cboe Global Markets  
New York, NY USA

William J. Kelly  
Chief Executive Officer  
CAIA Association  
Amherst, MA USA

Shari Kurgatnikov  
Internship and Outreach  
Administrator, Dept of  
Statistical Sciences  
University of Toronto  
Toronto, ON Canada

Christophe L'Ahelec  
Senior Principal, External Managers,  
Capital Markets  
Ontario Teachers' Pension Plan  
Toronto, ON Canada

Michael Lashendock  
Partner  
Napier Park Global  
New York, NY USA

Richard Leahy  
Principal  
Episteme Capital Partners (US), LLC  
Rye Brook, NY USA

Joshua Leonardi  
Director  
TD Securities  
New York, NY USA

Haosheng Li  
Senior Associate  
Alignvest Investment Management  
Toronto, ON Canada

Liana Li  
Manager  
Canada Pension Plan  
Investment Board  
Toronto, ON Canada

Marc Lorin  
Director of Strategic Relations  
Coquest  
Dallas, TX USA

DeWayne Louis  
Founding Partner, Investor Relations  
ARP Investments  
New York, NY USA

Donald Lucardi  
Global Head of Investor Relations  
Emso Asset Management  
New York, N USA

(please note: this does not reflect total delegates as some opt out of being on the printed list)



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