



ALTERNATIVE STRATEGIES: SMART PORTFOLIO CONSTRUCTION & THE BENEFITS OF DIVERSIFICATION

MARCH-MAY 2021 AUSTIN
A VIRTUAL CONFERENCE VIA WEBINARS

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We are pleased to provide you with this program guide for our Austin 2021 conference, ***Alternative Strategies: Smart Portfolio Construction & The Benefits of Diversification***. This virtual event was composed of eight separate panel discussions that we dubbed our Spring Series of Webinars.

While the world remained on pause due to the pandemic, Talking Hedge events provided a live forum for the alternative investment industry and its investors to stay connected. We are inspired by the audience response – bringing in registrations exceeding 500 professionals and expanding our footprint around the world.

Thanks to partnerships with leading industry participants, we had the privilege of bringing together investors, managers, and solutions providers from 28 countries. Our content sparked substantive discussions and lively debate about ways to solve the challenges faced by asset owners and fiduciaries. As with our in-person events, our aim was to focus on the successful, often customized, solutions that help investors cope with complex data, manage risk, streamline operations, achieve the benefits of diversification, and attain the alpha they need to achieve their goals.

Many thanks to our esteemed speaking faculty for sharing their perspectives, their wisdom, their stories, and their solutions!

We are privileged to have collaborated with **Innocap Investment Management, Lyxor Asset Management, and InfraHedge Limited/State Street**, and as well as **Bodhi Research Group, Crabel Capital Management, Efficient Capital Management, Graham Capital Management, O'Brien Investment Group, ROW Asset Management, SLC Management, and Teza Capital Management**

We also were proud to partner with three preeminent alternative investment industry associations: **AIMA, CAASA, and CAIA**.

It is an honor to produce events that stimulate an exchange of ideas and reflect the wealth of innovation that is the hallmark of the alternative investment industry.

Stay healthy, vigilant, and safe. We hope to see you in person next spring in Austin!

Meg Bode
Founder

CONFERENCE PROGRAM

Friday, March 5, 2021

More Art than Science: The Critical Importance of Qualitative Due Diligence

Moderator: Aaron Filbeck, CFA, CAIA, CIPM, FDP
Director, Global Content Development, CAIA Association

Panelists: Ranjan Bhaduri, PhD, CFA, CAIA
Chief Executive Officer, Bodhi Research Group

Keith Black, PhD, CFA, CAIA, FDP
Managing Director, Content Strategy, CAIA Association

Esther Zurba, CAIA
Director, Castle Hall

Friday, March 12, 2021

The Fixed Income Conundrum and The Search for Alternatives

Moderator: Sara Rejal
Senior Director, Investments, Willis Tower Watson

Panelists: Elizabeth Burton, CAIA
Chief Investment Officer, Employees' Retirement System of the State of Hawaii

Marcus Frampton, CFA, CAIA, FRM
Chief Investment Officer, Alaska Permanent Fund Corporation

Michael Pomada
President & Chief Executive Officer, Crabel Capital Management

Ryan O'Grady
Chief Executive Officer, ROW Asset Management

Friday, April 9, 2021

It's Not Enough to Be Different — Achieving True Diversification in an Increasingly Correlated World

Moderator: Diane Miller
Principal, Diversifying Alternatives Boutique, Mercer Investments

Panelists: Derek Drummond, CAIA
Portfolio Manager – Funds Alpha, State of Wisconsin Investment Board

Misha Malyshev
Chief Executive Officer, Teza Capital Management

John Twomey
Head of Research, Abbey Capital

Friday, April 16, 2021

The Implications of Monetary Policy on Portfolio Construction and Future Returns

Moderator: Travis Williamson, CAIA
Partner – Head of Hedge Fund Research, Albourne Partners

Panelists: Pablo Calderini
President and Chief Investment Officer, Graham Capital Management, L.P.

Shanta Chary
Director of Investments, Orange County Retirement Systems

Greg Turk, CFA
Director of Investments, Teachers Retirement System of Illinois

Friday, April 23, 2021

Investing in a Low Interest Rate Environment

Moderator: **Marat Molyboga, Ph.D., CFA**
Chief Risk Officer, Director of Research, Efficient Capital Management

Panelists: **Susanne Gealy**
Senior Director, Investments, Treasury, CommonSpirit Health

Paul Kreiselmaier, CFA
Head of Hedge Funds, Verus Investments

John Linder, CFA, CPA
Managing Director, SLC Management

Friday, May 7, 2021

***Optimize Structuring & Operating Alpha:
How to Customize an Emerging Manager Program***

Moderator: **Joshua Leonardi**
Director, Capital Introduction, TD Securities

Panelists: **Yan Kvitko, CFA**
Senior Portfolio Manager, Head of Emerging Manager Investing:
External Portfolio Management, CPP Investments

Daniel MacDonald, CFA
Head of Advisory & Pensions, Middlemark Partners

Jonathan Planté, CAIA
Director, Business Development, Innocap Investment Management Inc.

Friday, May 14, 2021

Opportunities in Cryptocurrencies Beyond Buy and Hold of Bitcoin

Moderator: **Chris Solarz, CFA, CPA, CAIA**
Managing Director, Cliffwater LLC

Panelists: **Andrew Chen**
Portfolio Manager, Lockheed Martin Investment Management Company

Joe Mitchell
Portfolio Analyst – Digital Assets & Director of Communications, Efficient Capital Management

John O'Brien, Jr., CAIA
Chief Executive Officer, O'Brien Investment Group

Friday, May 21, 2021

Centralizing Data to Support the End to End Needs of Investors

Moderator: **Rob Vanderpool**
President, InfraHedge North America, and Managing Director,
State Street Global Services, Alternative Investment Solutions

Panelists: **Carlos Ferreira, CPA, CFA, FRM**
Managing Director, Head of Investment Operations, PAAMCO Prisma

Mazen Jabban
Chairman & Chief Executive Officer, Vidrio Financial LLC

Erin Simpson
Managing Director, Wilshire Associates

SPEAKER BIOS



RANJAN BHADURI, PHD, CFA, CAIA

Founder, President and 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 has worked closely with pensions, sovereign wealth funds, endowments, and family offices globally. Dr. Bhaduri has ten years of experience at managed account platforms. Dr. Bhaduri's experience also 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.



KEITH BLACK, PHD, CFA, CAIA, FDP

Managing Director, Content Strategy, CAIA Association

Keith Black has over thirty years of financial market experience, serving approximately half of that time as an academic and half as a trader and consultant to institutional investors. He currently serves as Managing Director of Content Strategy for the CAIA Association. During his most recent role at Ennis Knupp + Associates, Keith advised foundations, endowments and pension funds on their asset allocation and manager selection strategies in hedge funds, commodities, and managed futures. Prior experience includes commodities derivatives trading, stock options research and Cboe floor trading, and building quantitative stock selection models for mutual funds and hedge funds. Dr. Black previously served as an assistant professor and senior lecturer at the Illinois Institute of Technology. He has contributed to the CFA Digest, and has published in The Journal of Wealth Management, The Journal of Trading, The Journal of Investing, and The Journal of Alternative Investments, among others. He is the author of the book "Managing a Hedge Fund," as well as co-author of the second, third, and fourth editions of the CAIA Level I and Level II curriculum. Dr. Black was named to the Institutional Investor magazine's list of "Rising Stars of Hedge Funds" in 2010. Dr. Black earned a BA from Whittier College, an MBA from Carnegie Mellon University, and a PhD from the Illinois Institute of Technology. He has earned the Chartered Financial Analyst (CFA) designation and was a member of the inaugural class of both CAIA and FDP members.

SPEAKER BIOS



ELIZABETH BURTON, MBA, CAIA

Chief Investment Officer – Employees' Retirement System of the State of Hawaii

Elizabeth Burton is the Chief Investment Officer of the Employees' Retirement System of the State of Hawaii ("HIERS"), where she oversees \$19 billion in pension fund assets. Ms. Burton is also on the Board of Directors of the Chartered Alternative Investment Association (CAIA). Prior to joining HIERS, Ms. Burton served as Managing Director of the Quantitative Strategies Group at the Maryland State Retirement Agency. In this role, Ms. Burton was responsible for the \$4.5B Absolute Return Portfolio and for risk management oversight of the \$55B Plan. Ms. Burton joined the Agency in July 2016. Previously, Ms. Burton owned William Street Advisory—a strategic advisory practice which she founded in 2013. Prior to that role, Ms. Burton was a Senior Economist and Expert Witness with Criterion Economics. Prior to that role, Ms. Burton was a Consultant at First Annapolis where she worked on M&A transactions and consulting the payments industry. Previous positions include: Co-Portfolio and Quantitative Risk Analyst with a South Africa-based fund of hedge funds, Trader (fixed income securities) for a risk management firm, and Portfolio Management Associate with a quant-focused fund of hedge funds. Ms. Burton received her Bachelor's degree in Political Science and French, cum laude, from Washington and Lee University, and her MBA in Finance, Econometrics & Statistics from the University of Chicago Booth School of Business. She is on the board of a private residential real estate investment trust and a Trustee of The Hill School, a private boarding school. She is also a CAIA charter holder. Ms. Burton was named one of Chief Investment Officer Magazine's Top-40-Under-40 in June 2017. In 2019 Ms. Burton received the Industry Innovation Award for <\$20B plan by Chief Investment Officer Magazine and was listed in the Power 100 in 2019. In 2020 she was added to the list of top 1% of institutional investors by The Trusted Insight. She has made several appearances on CNBC in 2020 to address the state of the markets in COVID.



PABLO CALDERINI

President and Chief Investment Officer, Graham Capital Management, L.P.

Pablo E. Calderini is the President and Chief Investment Officer of GCM and, among other things, is responsible for the management and oversight of the discretionary and systematic trading businesses at GCM. Mr. Calderini is also a senior member of the firm's Executive, Investment, Risk and Compliance committees. He joined GCM in August 2010 and became an Associated Person and Principal of GCM effective August 13, 2010. Prior to joining GCM, Mr. Calderini worked at Deutsche Bank from June 1997 to July 2010 where he held positions of increasing responsibility, most recently the Global Head of Equity Proprietary Trading. Mr. Calderini commenced his career at Deutsche Bank as Global Head of Emerging Markets. During his tenure at Deutsche Bank, Mr. Calderini also helped manage several groups across the fixed income and equity platforms, including the Global Credit Derivatives Team. Mr. Calderini received a B.A. in Economics from Universidad Nacional de Rosario in 1987 and a Masters in Economics from Universidad del CEMA in 1989, each in Argentina.



SHANTA CHARY

Director of Investments, Orange County Retirement Systems

Shanta Chary is the Director of Investments for Orange County Employees Retirement System. She has over 20 years of institutional investment management experience in the areas of asset allocation and the management of multi-asset portfolios. She joined OCERS in 1999 and has been closely involved in all facets of the investment program. Prior to joining OCERS, Shanta worked for Bankers Trust and Chase Manhattan Bank. Shanta holds an undergraduate degree in Economics from The City University of New York and an MBA in Finance from California State University, Fullerton.

SPEAKER BIOS



ANDREW CHEN

Portfolio Manager, Lockheed Martin Investment Management Company

Andrew Chen is a Portfolio Manager in the Absolute Return Strategies group within LMIMCo. In this role he focuses on the Long Short Equity portfolio, though he also sources and conducts investment due diligence across all Hedge Fund strategies. Prior to LMIMCo, Andrew was a Director at Gottex Fund Management, a Fund of Hedge Funds, with responsibility over the Structured Credit, Fixed Income Relative Value, and Event Driven Strategies. Before Gottex, he was an Associate at Attalus Capital, which he joined after starting his career on the Convertible Arbitrage desk at BNP CooperNeff Advisors. Andrew has a BSE in Bioengineering and a BA in Economics from the University of Pennsylvania, in addition to an MBA from INSEAD.



DEREK DRUMMOND, CAIA

Portfolio Manager – Funds Alpha, State of Wisconsin Investment Board

Derek Drummond, CAIA, is the Portfolio Manager for the Funds Alpha team at the State of Wisconsin Investment Board (SWIB), overseeing approximately \$30B in assets. Derek and his team are responsible for the sourcing, evaluation and implementation of external investment managers across both traditional and alternative investment strategies. Derek has over 20 years of experience developing and implementing investment structures for both asset owners and managers, including developing portfolio construction, analytics and risk management frameworks, and establishing manager due diligence and evaluation processes.



CARLOS FERREIRA, CPA, CFA, FRM

Managing Director and Head of Investment Operations, PAAMCO

Carlos provides firm-wide leadership to the Accounting and Operational Due Diligence, Operations and Treasury, Legal and Investment Structuring, and Compliance groups. Carlos is also a member of the firm's Investment Oversight Committee. Before joining PAAMCO, he was Head of Operational Due Diligence for LGT Capital Partners, based in Switzerland, from 2007 to 2010. Prior to this, Carlos was CFO/COO and Head of Operational Due Diligence for KBC Alpha Asset Management in London from 2005, where he was responsible for the non-investment activities of the business, including fund accounting and operational due diligence on underlying fund investments. Previously, he worked for Morgan Stanley's Private Wealth Management (Europe) division, in their Client Strategy and Hedge Fund groups, and for Arthur Andersen (now Deloitte) as an international corporate tax practitioner. Carlos began his career with KPMG as an auditor. Carlos holds an MBA from the London Business School as well as a Bachelor of Commerce degree from the University of Toronto.



AARON FILBECK, CFA, CAIA, CIPM, FDP

Director, Global Content Development, CAIA Association

Aaron Filbeck is responsible for content development and the strategic direction of CAIA Association's professional development and member education efforts. He has published on topics such as environmental, social and governance (ESG) investing, liquid alternatives, commodities, and asset pricing/factor investing. Prior to his role at CAIA Association, Aaron served as a portfolio manager and oversaw manager research and portfolio construction efforts at The Joseph Group Capital Management. Aaron earned a B.S. with distinction in Finance and a Master of Finance from Penn State University. He holds the Chartered Alternative Investment Analyst (CAIA), Chartered Financial Analyst (CFA), Certificate in Investment Performance Measurement (CIPM), and Financial Data Professional (FDP) designations. He is President of CFA Society Columbus, an adjunct faculty at Penn State University, and serves on multiple advisory boards for the Sam & Irene Black School of Business at Penn State Behrend.

SPEAKER BIOS



MARCUS FRAMPTON, CFA, CAIA, FRM

Chief Investment Officer, Alaska Permanent Fund Corporation

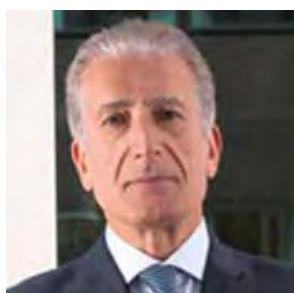
Marcus Frampton serves as the Chief Investment Officer for the Alaska Permanent Fund. He joined APFC in September of 2012 and has served as the Director of Investments, Real Assets & Absolute Return. Prior to joining the APFC, Marcus held diverse roles ranging from investment banking (Lehman Brothers), private equity (PCG Capital Partners), and acted as an executive of a private equity backed portfolio company (LPL Financial). Mr. Frampton holds a BA in Business-Economics with a minor in Accounting from UCLA.



SUSANNE GEALY

Senior Director, Investments, Treasury, CommonSpirit Health

Susanne Gealy is a Senior Director of the investments team at CommonSpirit Health based in San Francisco. She leads the organization's public and hedge fund equity investments. CommonSpirit Health is one of the largest health systems in the US, dedicated to providing quality, compassionate health care. The organization has an \$11 billion investment portfolio, allocated across the long-term strategic goals, retirement benefits, endowment, and insurance. Prior to joining CommonSpirit Health, Susanne spent 10 years at the Teacher Retirement System of Texas, in Austin, a \$150 billion retirement plan. At TRS, she was responsible for the \$26 billion external equity investment program comprising US, international, emerging markets, and global equity managers. Before joining TRS, Susanne worked in New York at Investcorp, Lazard Asset Management, a family office, and Banc of America Securities. She began her career in finance at JP Morgan in equity derivatives. Prior to attending business school, Susanne worked in the field of structural engineering in San Francisco. Susanne holds an M.B.A. from the University of Chicago's Booth School of Business. She has a M.S. and B.S. in Engineering from the University of Texas at Austin. Susanne is a board member of Trinity Charter School, a Texas charter school district dedicated to the educational needs of abused children.



MAZEN JABBAN

Chairman & Chief Executive Officer, Vidrio Financial LLC

Mazen founded Vidrio Financial in 2011 and is responsible for setting strategic direction and the firm's product development roadmap. In 1994, Mazen founded Focus Investment Group, an alternative investment firm, which incubated the development of the predecessor to the Vidrio Platform. In 1997 he started Focus Europa, one of the oldest European-focused fund-of-hedge-funds and in 2000 he established the Focus Star Fund, a hedge fund seeding program that identified and invested with emerging hedge fund managers. Prior to 1994, Mazen worked in real estate development and investment and later founded a management consulting and information systems company. He is an Adjunct Professor of Finance at NYU's Stern School of Business lecturing on alternative investments. Mazen received a B.S. in Engineering from the University of California – Berkeley (1978) and an M.B.A. in Finance from New York University, Stern School of Business (1981).

SPEAKER BIOS



PAUL KREISELMAIER, CFA

Head of Hedge Funds, Verus Investments

Mr. Kreiselmaier has over 20 years of investment experience in various roles in both manager due diligence and quantitative research and portfolio management. At Verus, he is primarily responsible for investment strategy, due diligence, portfolio construction recommendations and relationship building across the hedge fund universe. Prior to joining Verus, he was a senior research analyst at Russell Investments where he was responsible for evaluating, recommending and monitoring hedge fund managers for inclusion in client portfolios. He began his career at Russell evaluating US large cap equity and Global Tactical Asset Allocation (GTAA) managers. He also worked at Mellon Capital Management where he held both research and portfolio management related roles focused on both equity and GTAA mandates. Mr. Kreiselmaier graduated from Trinity University with a bachelor of arts (BA) degree in economics. He also holds a master's degree in business administration (MBA) from the University of Texas at Austin. He is a CFA charter holder (Chartered Financial Analyst) and a member of both the CFA Institute and the CFA Society of Seattle. Mr. Kreiselmaier is also a member of the Chicago Quantitative Alliance (CQA).



YAN KVITKO, CFA

Senior Portfolio Manager, Head of Emerging Manager Investing: External Portfolio Management, CPP Investments

Yan Kvitko is a Senior Portfolio Manager with CPPIB's External Portfolio Management (EPM) team. He is responsible for the Emerging Manager program globally which pursues investments in early stage hedge fund managers. Prior to joining CPPIB, he worked at New Holland Capital, where he was a Senior Portfolio Manager responsible for investment research and portfolio management with a focus on quantitative strategies. Yan began his career at Ziff Brothers Investments. Yan holds a BS in Computer Science from Stanford University and an MA in piano performance from the Conservatorium van Amsterdam. He is a CFA charterholder.



JOSHUA LEONARDI

Director, TD Prime Services LLC

Josh Leonardi is a Director and the Head of Capital Introduction at TD Securities LLC. Josh joined TD in May 2018 and is responsible for overseeing TD's Capital Introduction offering. Prior to joining TD, Josh was at Goldman, Sachs & Co. for 7 years where he first served as a Vice President and Assistant General Counsel for the Prime Services business before moving to Goldman's Capital Introduction team in 2015. Josh began his career at Fried Frank in 2006 where he was an associate in the firm's Asset Management practice and focused primarily on the structuring and representation of hedge funds and other alternative investment products. Josh received a B.B.A. in Finance from The George Washington University and his J.D. from New York Law School.



JOHN LINDER, CFA, CPA

Managing Director, Business Development, SLC Management

John joined Ryan Labs Asset Management, which is now Sun Life Capital Management (U.S) LLC, in 2018. Since joining, he has worked with clients on customized comprehensive fixed income solutions, incorporating traditional active fixed income strategies as well as futures overlay strategies. John works closely with consultants and plan sponsors focusing on traditional active fixed income allocations and economic crisis offset solutions. John's portfolio of work includes over 20 years as an advisor to public pension plans, consultants, foundations, and asset managers. He is a CFA Charterholder and Certified Public Accountant (CPA). John holds a B.A. from Middlebury College, and a Masters in Accountancy from the Kenan-Flagler Business School UNC Chapel Hill.

SPEAKER BIOS



DANIEL MACDONALD, CFA

Head of Advisory & Pensions, Middlemark Partners

Daniel MacDonald is the Head of Advisory and Pensions at Middlemark Partners. Previously, Mr. MacDonald spent sixteen years with Ontario Teachers' Pension Plan Board (OTPP), where he was responsible for manager selection, portfolio construction, and investment due diligence, among other duties. He successfully managed a portfolio of hedge fund managers that covered a diverse range of liquid strategies, including Equity Long/Short, Systematic Equity, Event-Driven Equity, Managed Futures, and Alternative Beta/Smart Beta/Low Cost Generics. Prior to OTPP, Daniel worked for Citibank Canada, as a Manager in the Equity Derivatives department. Previously, Mr. MacDonald served as a Credit Analyst at IBM Canada. Mr. MacDonald received an LL.B from York University's Osgoode Hall Law School, an MBA from York University's Schulich School of Business, and a BBA from York University. He is also a Chartered Financial Analyst (CFA).



MISHA MALYSHEV

Chief Executive Officer, Teza Capital Management

Misha founded Teza in 2009 as a systematic trading firm; in the decade since, the firm has expanded into asset management, leveraging its low latency expertise and infrastructure into longer time horizons. Misha earned his Ph.D. in Astrophysics from Princeton University in 1998. He also holds an M.S. in Theoretical Physics and a B.S. degree summa cum laude in Physics and Mathematics from Moscow Institute of Physics and Technology. Dr. Malyshev worked for Bell Labs conducting scientific research until 2000. From 2000 through early 2003, he worked as a consultant with McKinsey & Company, where he developed substantial experience working for asset management and investment banking clients. Dr. Malyshev joined Citadel Investment Group, L.L.C. in April 2003 as a member of its strategy group. In 2004, he moved to Citadel's Quantitative Analytics group, where he developed a quantitative trading business. Dr. Malyshev was rapidly promoted to the position of Managing Director and Global Head of High Frequency Trading at Citadel, which he held until he resigned in the winter of 2009. Dr. Malyshev is an avid supporter of education initiatives, and has partnered with organizations that inspire young people, particularly women and minorities, to pursue careers in science, technology, engineering and math. He is currently on the global leadership council of build On, an international nonprofit organization that runs youth service after-school programs in United States high schools and builds schools in developing countries.



DIANE MILLER

Principal, Diversifying Alternatives Boutique, Mercer Investments

Diane is a Principal in the Diversifying Alternatives Boutique, a unit within Mercer Investments. Located in London, she researches systematic and discretionary macro and alternative risk premia strategies. Diane has over 25 years of experience within the pensions and investment industry. She joined Mercer in 2001 as a Senior Consultant. Prior to moving full-time to manager research in early 2005, she was involved in advising clients on investment consulting issues. Before joining Mercer, she was an Associate Director at Morley (now Aviva) and its predecessor companies, General Accident and Provident Mutual, where she worked as a fund manager, specialising in UK equities and asset allocation for pension fund clients. Diane studied mathematics at University College, London and is a Fellow of the Institute of Actuaries.



JOE MITCHELL

Portfolio Analyst – Digital Assets & Director of Communications, Efficient Capital Management

Mr. Mitchell is the Portfolio Analyst, Digital Assets and Director of Communications and is responsible for interfacing with and facilitating Efficient's Investment Team and Business Development team. In addition, Mr. Mitchell has been researching and building knowledge about the development of the cryptocurrency and digital asset space. Areas of interest include trading managers and fintech innovation. Mr. Mitchell has been with Efficient since 2004.

SPEAKER BIOS



MARAT MOLYBOGA, PHD

Chief Risk Officer and Director of Research, Efficient Capital Management

Dr. Molyboga is the Chief Risk Officer and Director of Research at Efficient Capital Management and helps shape strategic priorities as a member of the Leadership Team. He began his career at Efficient in 2001 as a Research Analyst. His expertise is in CTA performance evaluation and portfolio construction. Dr. Molyboga is also an expert in portfolio risk management and serves as the Chief Risk Officer for the firm, while also overseeing the work of the Research Team. Dr. Molyboga is a Chartered Financial Analyst (CFA). He graduated with high honors from Moscow State University in 2001 with a Masters in Financial Mathematics. He also graduated with honors from the University of Chicago's Booth School of Business in 2013 with an MBA in Finance, Economics and Strategic Management. He earned a PhD in Finance from EDHEC Business School in 2019. Dr. Molyboga is an Adjunct professor at the Illinois Institute of Technology Stuart School of Business where he teaches Quantitative Investment Strategies. He has appeared in many journals such as the Journal of Portfolio Management, Journal of Alternative Investments, Journal of Futures Markets, etc. He is passionate about academic research with practical applications to investors.



JOHN O'BRIEN, JR., CAIA

Chief Executive Officer, Portfolio Manager, O'Brien Investment Group

John O'Brien Jr. is the CEO of the O'Brien Investment Group and is responsible for operational and trading oversight, risk management, and day-to-day management of the Advisor. He is also portfolio manager for the O'Brien Investment Group Pecus Digital Assets Fund, LP. Previously, Mr. O'Brien was employed as a floor broker and trader with R.J. O'Brien & Associates from June 2003 to March 2008. Mr. O'Brien was an investment analyst at O'Brien International, LLC, analyzing global macro-economic themes, performing due diligence on hedge funds and CTAs and investing the firm's capital from March 2008 until May 2012. From May 2012 to December 2018, Mr. O'Brien served as CEO of Clark Capital Management, Inc. Mr. O'Brien also serves as managing partner for WAG Holdings, LLC, a real estate investment group since December 2010. Mr. O'Brien has served as CEO of the OBIG since inception and the launch of their first trading program, Quantitative Global Macro, in 2017. Mr. O'Brien graduated from DePaul University in March 2008, with a Bachelor's degree in Economics.



RYAN O'GRADY

Chief Executive Officer, ROW Asset Management

Ryan O'Grady is the Chief Executive Officer and a Founding Principal at ROW Asset Management. At ROW, Ryan is the Chairperson of the Research Committee, and co-Chair of the Investment Committee. Prior to co-founding ROW Asset Management in July 2010, Ryan was the Head of Investment Research at FX Concepts from 1999 to 2009. Ryan also served as Manager of New Model Research and as Portfolio Manager at FX Concepts from 1993 to 1999, and as an assistant trader from 1992 to 1993. Ryan started his career in quantitative financial research at the age of 17, as an intern at Neuberger Berman. Ryan has a B.A. in Economics from The Johns Hopkins University, and an M.S. in Statistics and Operations Research from the Stern School of Business at New York University. He also completed coursework toward a PhD in Economics at the University of California, Irvine. Ryan is one of the founding members of the Industry Advisory Board for the UCLA Anderson School of Management Masters in Financial Engineering Program and continues to serve on the Board.

SPEAKER BIOS



MICHAEL POMADA

President & Chief Executive Officer, Crabel Capital Management

Michael Pomada is President and Chief Executive Officer of Crabel Capital Management. In addition to his executive role, Mr. Pomada is the Portfolio Manager of Crabel Gemini and Crabel Contra as well as the chief architect behind the development of CCM's Advanced Trend strategy. Mr. Pomada joined CCM in 2008 as a portfolio manager focusing on CCM's Equity Main strategies and in late 2009, took on the responsibility of spearheading a firmwide initiative to revamp the organization's trading infrastructure, execution process, and microstructure research. He is a member of the firm's executive and investment committees and, before being named CEO in 2016, he was previously CCM's Chief Operating Officer. Prior to joining CCM, Mr. Pomada spent time at UBS before moving on to manage portfolios at Manchester Trading and Coast Asset Management. Mr. Pomada began his career in the Interactive Entertainment industry. A graduate of the University of California -Berkeley, he also holds an M.B.A. with a concentration in Investments and Statistics from the University of Southern California.



JONATHAN PLANTÉ, CAIA

Director, Business Development, Innocap

Jonathan Planté is Director of Business Development at Innocap, a premier managed account platform for institutional investors. He focuses on structuring investment programs by customizing risk, governance, legal and operational frameworks. To develop effective solutions, Jonathan believes in building partnerships that empower clients with control and transparency. During his 13 years in the alternative investments industry, he has held various roles across North America and Europe in private and public markets. Jonathan holds a graduate degree in Finance from HEC Montréal, a Master's degree in International Business Development from ESC Saint-Étienne and the CAIA designation. For the past 5 years, he has been a lecturer at HEC Montréal where he teaches alternative investments to graduate students. He is actively engaged in the field of applied neuroscience both in practice and through youth-centred social initiatives. He is the founder of 4 Next Generation, which advocates for social coherence by advancing children's cognitive development and learning. He also serves on the Leadership Council of Capitalize for Kids, a non-profit organization focused on building capacity and solutions in support of children's brain and mental health.



SARA REJAL

Senior Director, Investments, Willis Tower Watson

Sara Rejal is a Senior Director and Head of the Liquid Diversifying Manager Research team of Willis Towers Watson, responsible for diversifying hedge fund, alternative beta, insurance-linked, multi-asset and liquid multi-manager strategies. She is also a member of the Global Portfolio Management Group and the investment committees of the Diversifying Strategies Fund and the Hedge Advantage Fund. Sara joined Willis Towers Watson in January 2014 and prior to this, was at HSBC for seven years in the London, New York and Geneva offices of the Alternative Investment Group. From 2005-2006 she worked for Ford Motor Company. Sara graduated from Imperial College, London with a Master's degree in Mechanical Engineering (MEng).

SPEAKER BIOS



ERIN SIMPSON

Managing Director, Wilshire Associates

Erin Simpson is a Managing Director of Wilshire and is the head of Wilshire's Investment Operations and Risk Management group. Ms. Simpson is a voting member of Wilshire's Investment Committee and has over sixteen years of experience in risk management and portfolio construction within the alternative asset industry. Prior to joining Wilshire in 2013, Ms. Simpson performed risk analysis and designed and developed risk and reporting systems for Merrill Lynch's Hedge Fund Development and Management Group ("HFDMG"). She then became the executive vice president of Risk Fundamentals, a risk transparency software company spun-out of Merrill's HFDMG. Previously, Ms. Simpson worked as a risk analyst at Kenmar Global Investments. Prior to entering the financial services industry, she spent three years with NASA specializing in space science and astronomical research at the Space Telescope Science Institute. Ms. Simpson received her BS in astrophysics from Yale University and her MS in information and telecommunication systems from Johns Hopkins University.



CHRIS SOLARZ, CFA, CPA, CAIA

Managing Director, Cliffwater LLC

Chris is a Managing Director at Cliffwater LLC covering global macro and relative value strategies on the hedge fund research team. Prior to joining Cliffwater in 2011, Chris was a Senior Analyst at SAIL Advisors, where he focused on manager selection and due diligence as Head of Research for tactical trading and relative value strategies. Previous experience includes working for ING Investment Management, Antarctica Asset Management, Societe Generale Barr Devlin, and CIBC World Markets. He earned a BA in Economics and Anthropology from the University of Pennsylvania and a MComm in Finance from the University of New South Wales, where he was a Federation Scholar. Chris is a Certified Public Accountant, holds the Chartered Alternative Investment Analyst® designation, the Chartered Financial Analyst® designation, and is a member of the New York Society of Security Analysts. Chris has broken 7 Guinness World Records and has run marathons on all 7 continents and in all 50 US states.



GREG TURK, CFA

Director of Investments, Teachers Retirement System of Illinois

As Director of Investments, Mr. Turk oversees public and private market investments at ILTRS. Assets under management at the fund are \$50 billion and encompass investments in public equity, private equity, public income, private debt, private real assets and diversifying strategies. In his role as Director of Investments, he leads asset allocation and portfolio management across the platform while also being actively involved in manager level due diligence and direct company analysis. Mr. Turk has also been active in creating the proper risk monitoring framework across the plan. Prior to joining ILTRS, Mr. Turk was employed by the CFA Institute within the Centre for Financial Market Integrity. He also has undertaken positions within the investment banking and investment management industries at firms such as Bear Stearns and Investors Management Group. Mr. Turk is a CFA charterholder and holds an MBA from the Darden Graduate School of Business Administration at the University of Virginia. He received a Bachelor of Science in Finance and Banking from the University of Illinois in Urbana-Champaign.



JOHN TWOMEY

Head of Research, Abbey Capital

John's responsibilities include manager analysis and due diligence, on-going fundamental research, management of the analyst team and setting the research agenda for the company. As a voting member of the investment committee, John participates in all aspects of Abbey Capital's manager appraisal activities. John joined Abbey Capital in 2009 following completion of a M.Sc. in Financial Economics from the University College Cork ("UCC") School of Economics. He also holds a B.Sc. in Finance from UCC in addition to holding the Chartered Alternative Investment Analyst ("CAIA") qualification. John's academic research focused on the application of regression analysis and the bootstrapping algorithm to fund performance and his work has been published in the Journal of Wealth Management.

SPEAKER BIOS



ROB VANDERPOOL

President, InfraHedge North America, and Managing Director, State Street Global Services, Alternative Investment Solutions

Rob is the President of InfraHedge North America and has over 18 years' experience in the financial services and asset management industry. He leads our relationship management and business development functions globally. Prior to joining InfraHedge in 2018, Rob was in the Chief Investment Office as Head of Investment Product at Northern Trust responsible for over \$280b of Northern Trust's investment platform. As Head of Investment Product, Rob was in charge of the construction and management of the Investment Platform including internal and external investment manager products. In addition, Rob previously was Global Head of Valuations which entailed in depth credit research, financial modelling and quantitative analysis to Equity, Fixed Income and Alternative portfolio Managers. Rob sat on the firms' Investment Advisory Committee, Investment Governance Committee, Centrally Managed solutions Committee, ESG Council and Commissions & Trading Committee. Previously, Rob worked at PIMCO on the Fund Statistics team in Newport Beach, CA and AVM, a \$5.2B hedge fund invested in fixed income arbitrage, long/short credit and tail hedging and volatility strategies. Rob's broad executive responsibilities involve developing long-term strategy, executing operating plans, managing client and vendor relationships, and developing and retaining talented professionals. Rob holds a Bachelor of Science from St. Michael's College, a Statistics and Operations Program from the Massachusetts Institute of Technology and a MBA from University of Chicago - Booth School of Business.



TRAVIS WILLIAMSON, CAIA

Partner – Head of Hedge Fund Research, Albourne Partners

Travis Williamson is a Partner at Albourne America and the Head of Hedge Fund Research. Prior to joining Albourne in 2013, Mr. Williamson was a Senior Markets & Policy Analyst at the Federal Reserve Bank of New York where he focused on furthering the Federal Reserve Systems analysis and interactions with buy-side market participants, with a focus on hedge funds. Before joining the Federal Reserve Bank of New York Mr. Williamson held roles at Morgan Stanley, Royal Bank of Canada, and DCF Capital. Mr. Williamson earned an MBA from the University of Connecticut, a degree in Economics from Lafayette College, and holds the CAIA designation.



ESTHER ZURBA, CAIA

Director, Castle Hall

Esther Zurba is a Director with Castle Hall, responsible for leading business development, and lending subject matter expertise across Castle Hall Diligence's ongoing product development and client engagements: helping clients move up the due diligence value chain with portfolio risk management solutions. Esther has more than 20 years of professional experience including over 14 years conducting operational due diligence on global investment managers across all asset classes. Esther joined Castle Hall Diligence in 2012 from Scotia Capital's Trade Operations and Risk Control group, where she conducted ODD on external asset managers supporting multiple business lines. Prior to joining Scotia Capital, Esther worked with Mapleridge Capital, a Toronto based short-term systematic CTA. Esther holds an MBA from Richard Ivey School of Business at the University of Western Ontario, and BA (Hons) from University of Toronto. Esther is also a CAIA charterholder and is actively involved with the CAIA Association in various capacities, including as a member of the Gender Diversity Advisory Board. Esther is currently the chapter head of the CAIA Toronto Chapter and a member of AIMA Canada's Education & Research, and Legal, Finance & Compliance Committees.

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