Mining New Sources of Alpha with Alternative Investment Solutions

June-August 2021 Toronto

A VIRTUAL CONFERENCE VIA WEBINARS

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TALKING HEDGE

We are pleased to provide you with this program guide for our Toronto 2021 virtual conference, ***Mining New Sources of Alpha with Alternative Investment Solutions***. This event, our Summer Series of Webinars, was composed of five separate panel discussions focused a variety of investment challenges and opportunities that are detailed herein.

For well over a year now, due to Covid-related travel restrictions, Talking Hedge has produced several series of webinars to “replace” the three in-person conferences we traditionally create each year. Thanks to fantastic industry support, we have presented 26 webinars on timely topics that have helped to keep the alternative investment industry and its institutional investors connected and engaged.

As with our in-person events, the goal of our content continues to focus on the innovative solutions offered by alternative investment specialists that add important diversification and alpha-seeking benefits to institutional portfolios. We consistently engender lively discussions around themes including how to benefit from the ever-changing investment landscape, the impact of global events, innovative investment strategies and structures, the importance of adding non-correlated assets to a portfolio, and the use of data and technological advancements that help investors protect and grow assets. Partnering with leading industry practitioners, we’ve brought together hundreds of investors, managers, and solutions providers from as many as 28 countries during each webinar series.

We are grateful to our stellar speaking faculty for sharing their ideas, research, opinions, solutions, and forward-looking insights! It is their participation that has allowed us to attract such a sophisticated global audience.

We are proud to have collaborated with **Efficient Capital Management**, **Lyxor Asset Management**, and **InfraHedge Limited/State Street**, and as well as **Alphidence Capital Ltd**, **Auspice Capital Advisors**, **Bodhi Research Group**, **Crabel Capital Management**, **FARCapital**, **Graham Capital Management**, **O’Brien Investment Group**, **Strix Leviathan**, and **Unigestion**.

We also are appreciative of our partnerships with three preeminent industry associations: **AIMA**, **CAASA**, and **CAIA**.

It’s an honor to create events that spark ideas, relationships, and solutions – all while aiming to demystify the abundant innovation that is the cornerstone of the alternative investment industry.

Stay healthy and safe. Our fall series, “replacing” our Santa Monica event, will be announced soon, and we hope to see you in person next spring in Austin!

Meg Bode
Founder

CONFERENCE PROGRAM

Friday, June 25, 11am-12pm

"Portfolio Management in an Inflationary World: Opportunities and Pitfalls"

Moderator: Steven Geovanis
Chief Risk Officer, Lyxor Asset Management, Inc.

Panelists: Aiman El-Nahas, CAIA
Senior Advisor, Fund Management Group, Ontario Power Generation

Patrick Esteruelas
Head of Global Research, Emso Asset Management US LLC

Atul Lele, CFA
Portfolio Strategist, Bridgewater

Luigi Rossi, CFA
Portfolio Manager, External Managers, Ontario Teachers' Pension Plan

Friday, July 9, 11am-12pm EDT

"Crisis Protection 2.0: Optimizing Liquid Alternatives for Crisis Returns and Long-Term Returns"

Moderator: Michael Ide, CFA
Hedge Fund Investment Due Diligence Analyst, Albourne America LLC

Panelists: Nicolas Dang, CFA, FRM, CAIA
Manager – Absolute Return, CN Investment Division

Brandon Gill New, CFA
Senior Portfolio Manager, Multi Strategy Investments, OPTrust

Edward Tricker, PhD
Chief Investment Officer, Quantitative Strategies, Graham Capital Management

Friday, July 23, 11am-12pm EDT

"Investing in the New Commodity Supercycle: A Generational Demand Shock Meets a Decade of Under-Investment"

Moderator: Herman Laret
Director, Risk Parity, Global Macro, CTA, and Multi Strategy, Titan Advisors

Panelists: Tim Pickering
Founder & Chief Investment Officer, Auspice Capital Advisors

Mark Raskopf, CFA
Portfolio Manager, Head of Tactical Trading Strategies, Russell Investments

Steven Wilson
Director, Stable Value Hedge Funds and ACWI Beta One, Teacher Retirement System of Texas

Friday, July 30, 11am-12pm EDT

"Cryptocurrencies: Where Do We Go from Here?"

Moderator: Scott Army
Managing Director & Chief Investment Officer, Galaxy Vision Hill at Galaxy Digital

Panelists: Nico Cordeiro
Chief Investment Officer, Strix Leviathan

Tracy Fong
Partner, VC/Crypto, Albourne Partners

John J. O'Brien, CAIA
Chief Executive Officer & Portfolio Manager, O'Brien Investment Group

Friday, August 13, 11am-12pm EDT

"Managed Futures, Macro, and Beyond…Taming Risk in a Rapidly Changing Environment"

Moderator: Chad Martinson, CAIA
Co-CIO & Managing Director, Investments, Efficient Capital Management

Panelists: Jeremy Gatto
Senior Vice President, Portfolio Manager, Cross Asset Solutions, Unigestion

Grant Jaffarian
Portfolio Manager, Crabel Capital Management

Igor Yelnik
Chief Executive Officer & Chief Investment Officer, Alphidence Capital Ltd.

SPEAKER BIOS

SCOTT ARMY

Managing Director & Chief Investment Officer, Galaxy Vision Hill at Galaxy Digital

Scott Army is Managing Director and CIO of Galaxy Vision Hill. Galaxy Vision Hill is the multi-manager fund of funds business division of Galaxy Fund Management. Prior to Galaxy Vision Hill, Scott was the Founder and CEO of Vision Hill Group, which was acquired by Galaxy Digital in May 2021. Prior to Vision Hill, Scott spent the majority of his career at JPMorgan Chase, as an Executive Director in the High Yield Credit Trading group. Scott graduated magna cum laude from Georgetown University.

NICO CORDEIRO

Chief Investment Officer, Strix Leviathan

Nico Cordeiro is the CIO and a member of the Strix Leviathan Nest Fund Investment Committee. He oversees quantitative research, strategy development, risk management, and portfolio allocation (3.5 years at Strix and 5 years total). Nico previously led cryptocurrency research within the alternative investments research group at PitchBook conducting quantitative research in private equity, venture capital, and cryptocurrencies. He is also a veteran and served in Iraq and Afghanistan as an Infantry Platoon Sergeant where he led teams in high-stress environments for 10 years. Nico holds a Master's in Finance from Seattle University, a bachelor's degree from The University of Washington.

NICOLAS DANG, CFA, FRM, CAIA

Manager – Absolute Return, CN Investment Division

Nicolas T. H. Dang joined the CN Investment Division in September 2008. In his current assignment as Manager, he elaborates and executes the Absolute Return strategy as part of a Portable Alpha mandate. Nicolas began his career as a Proprietary Futures & Cash Equities Trader. He subsequently joined a hedge fund in Montreal as an Energy Derivatives Trader. Nicolas then became the lead Analyst at an investment boutique where he helped manage 4 quantitative equity hedge funds. Prior to joining the CN Investment Division, Nicolas was Partner and Owner of a systematic hedge fund based in Montreal. Nicolas holds a Bachelor of Commerce Degree, Major in Finance, from John Molson School of Business of Concordia University in Montreal. He is a Chartered Financial Analyst (CFA), a Financial Risk Manager (FRM) and a Chartered Alternative Investment Analyst (CAIA). Nicolas was named Top 40 under Forty in 2015 and Top 25 NextGen in 2018 by CIO magazine. He is Founder of Junto Montreal Society, a nonprofit dedicated to democratizing knowledge for the benefit of the community.

AIMAN EL-NAHAS, CAIA

Senior Advisor, Fund Management Group, Ontario Power Generation

Aiman El-Nahas is a Senior Advisor within the Fund Management Group at Ontario Power Generation (OPG), which oversees over $30 billion in balance sheet capital. He is responsible for all credit investment-related work streams including the development of opportunity pipeline, investment underwriting and execution process, as well as the post-close management of portfolio positions and investment platforms. Prior to OPG, Aiman spent 6 years with BNY Mellon's OCIO business providing investment solutions for large family offices, pension plans and endowments in Canada and the US. Aiman holds an MBA from Schulich School of Business at York University in Toronto and is a Chartered Alternative Investment Analyst.

SPEAKER BIOS

PATRICK ESTERUELAS

Head of Global Research, Emso Asset Management US LLC

Patrick started his career in 2000 at the Inter-American Development Bank, where he served in various consulting capacities. He then joined Eurasia Group as director for Latin America where he actively supported the Latin American investment strategies of multiple hedge funds, mutual funds, and money managers. Prior to joining Emso in 2011, he was a Vice President at Moody's Sovereign Risk Group, where he covered multiple countries across the ratings space. His deep knowledge and experience in political risk analysis complements the portfolio management team's market experience in Emso's investment process. Patrick earned an MA in International Relations and Economics from Johns Hopkins School of Advanced International Studies (SAIS) and a BA in European Studies from the London School of Economics.

TRACY FONG

Partner, VC/Crypto, Albourne Partners

Tracy Fong is an alternative investment professional with over 22 years of experience across startups, public technology companies, investment banking, alternatives endowment management, fixed income and foreign exchange, and strategic equities management. She has a passion for global, complex and emergent investment opportunities, e.g. healthcare structured investments in 2015, SaaS revenue-based loans and marketplace lending in 2016, technology company SPACs in 2017, and crypto assets in 2017.Ms. Tracy Fong is a Partner and Private Markets Investment Due Diligence Analyst at Albourne Partners, a leading investment consulting firm that advises on over $550bn of alternative assets to over 300 institutional clients. She leads the Firm's global Venture Capital coverage (including crypto/blockchain) and previously served as the co-chair of the Private Markets Investment Committee. Ms. Fong was previously a Managing Director at SVB Capital's $4bn+ VC fund-of-funds and direct VC fund. Ms. Fong also spent four years at the Harvard University endowment, Harvard Management Company, where she was Vice President of Alternative Assets and worked on HMC's $20bn+ alternatives portfolio construction, investment manager selection, and direct natural resources transactions (including timber and agriculture). Her Venture Capital experience included allocations to prominent access-constrained firms and strategic transactions resulting from the IPOs of numerous portfolio companies. Prior to business school, she also worked at Yahoo! (NASDAQ: YHOO) on the Corporate Finance and Treasury Team, where her group managed Yahoo!'s $4bn+ fixed income portfolio; worked on structured transactions; and helped manage 30 acquisitions, including the landmark joint venture with Alibaba (NYSE: BABA). Ms. Fong has also worked in Investment Banking at Citigroup and Goldman Sachs where she worked on Technology Mergers & Acquisitions and Corporate Finance transactions including the IPO of Netscreen Technologies (NASDAQ: NSCN) and NPTest Holding (NASDAQ: NPTT). During the first technology boom, Ms. Fong began her career at two startup companies, Webvan Group (NASDAQ: WBVN) and Varsitybooks.com. Webvan, a Sequoia and Benchmark-backed company, was one of the first online grocery delivery services, was called by CNET one of the most well-known companies of the dot-com era.Today, Ms. Fong is recognized as an early participant in the crypto and digital asset market, including cryptocurrencies and blockchain developer projects and recognition as one of recognized women in crypto. She has relationships with developers, founders, VCs, and hedge funds. She enjoys incorporating her relevant long history and experiences in macroeconomics, public fixed income, emerging markets debt, and commodities investing. Ms. Fong received a B.S. in Business Administration from the University of California, Berkeley (honors recognition) and an M.B.A. from Harvard Business School. In her spare time, Ms. Fong enjoys adventurous international travel (~60 countries), immersive art projects, listening to podcasts, and scuba diving.

SPEAKER BIOS

JEREMY GATTO

Senior Vice President, Portfolio Manager, Cross Asset Solutions, Unigestion

Jeremy Gatto, Senior Vice President, is Portfolio Manager within the Cross Asset Solutions team. Jeremy joined Unigestion in 2013 as a trader. He began his career in 2007 at Crédit Agricole CIB London before joining Tiberius Asset Management AG in 2008 as a Trader focusing on commodities and became Head of Trading in 2011. Jeremy Gatto holds a Bachelor of Science degree in Economics from the University of London, UK.

STEVEN GEOVANIS

Chief Risk Officer, Lyxor Asset Management, Inc.

Steven Geovanis joined Lyxor Asset Management Inc. ("Lyxor Americas") as Chief Risk Officer in 2007. From 2004 to 2006, Mr. Geovanis was a founding Partner and Head of Macro Trading at Citigroup's Tribeca Hedge Fund. From 2001 to 2004, Mr. Geovanis was Head of Market Risk for the Americas at HSBC and a member of HSBC's Asset and Liability Committee. He was also a founding Partner of Summit Capital, where he worked from 1996 to 1998, and was responsible for foreign exchange trading and market risk. From 1984 to 1996, Mr. Geovanis was at Merrill Lynch where he ran Global Foreign Exchange Trading and served as President of Merrill Lynch International Bank. While at Merrill Lynch, he also headed the Global Currency and Bond Option Desks. Mr. Geovanis received his B.A. from Harvard University and an M.B.A. from the Wharton School of Business at the University of Pennsylvania.

MICHAEL IDE, CFA

Hedge Fund Investment Due Diligence Analyst, Albourne America LLC

Michael Ide is a Hedge Fund IDD analyst at Albourne Partners covering Volatility Arbitrage and Tail Risk hedge funds. Before joining Albourne in 2015, Michael worked as a freelance writer and as a Peace Corps volunteer. He has an MBA from the University of Cyprus, an MA in Physics from UC San Diego and is a CFA charterholder.

GRANT JAFFARIAN

Portfolio Manager, Crabel Capital Management

Grant Jaffarian is the Portfolio Manager of Crabel Advanced Trend and a member of the firm's Executive Committee. Grant joined CCM in 2014 as part of its acquisition of AlphaTerra where he was the Founder and Chief Investment Officer. Prior to launching AlphaTerra in April 2013, Grant served as the Chief Investment Officer at Efficient Capital Management. He began his career at Belgium-based Analytic Investment Management, a high turnover futures manager acquired by Robeco Bank. From there, he went on to found Petra Intraday, a short-term systematic investment manager, before joining Efficient. Grant earned a bachelor's degree from Wheaton College where he majored in English and holds an MBA with a concentration in economics from the University of Chicago.

HERMAN LARET

Director, Risk Parity, Global Macro, CTA, and Multi Strategy, Titan Advisors

Joining Titan Advisors n 2014, Herman Laret is Director of Titan's Global Macro, CTA & Multi-Strategy. Previously, he was a managing director at Credit Suisse in global macro product sales and held positions that included co-head of interest rate sales and treasury product manager. During his 14 years with the firm's Proprietary Fund Investment Committee, responsible for investing the firm's capital in hedge funds. In addition, Herman was a partner and senior portfolio manager at MKP Capital Management, trading G10 rates products. Hed began his career at Salomon Brothers working in M&A in London and as a government bond trader in New York. Herman has a degree in medicine from Leiden University in the Netherlands.

SPEAKER BIOS

ATUL LELE, CFA

Portfolio Strategist, Bridgewater

Atul Lele joined Bridgewater in 2018 and is currently a Portfolio Strategist. He is a senior member of the research group and, also, works with Bridgewater's clients to develop investment strategies that meet their objectives and to provide insight into the research group's thinking on global markets and economic conditions. Prior to joining Bridgewater, Atul spent five years as the Chief Investment Officer of Deltec International Group, where he was responsible for their investment management and advisory platform, focusing on the investment strategy and outlook, portfolio management and analytical processes behind the strategic and tactical global macro funds, and authoring the firm's global macro research publications. Prior to that, Atul spent five years as the Head of Strategy, Economics and Quantitative Research for Credit Suisse Australia, where he was top ranked by clients and external surveys. Before that, he spent eight years as a Portfolio Manager and Partner at White Funds Management, a boutique multi-asset class fund manager. Atul has regularly appeared in the financial media and in investment-related books. He is also a CFA charterholder and holds a Bachelor of Commerce in Accounting and Finance from the University of New South Wales.

CHAD MARTINSON, CAIA

Co-CIO & Managing Director, Investments, Efficient Capital Management

Mr. Martinson is the Co-Chief Investment Officer and the Managing Director of Investments at Efficient. In this role, he manages the firm's investment process, serves as the Portfolio Manager, and helps shape strategic priorities as a member of the Leadership Team. Mr. Martinson joined Efficient in 2002 after nearly a decade in the technology industry, serving as the firm's Chief Technology Officer. After leading the development process to build out Efficient's proprietary managed futures platform, he joined the investment team in 2005 and has served as the Portfolio Manager since the end of 2007. Mr. Martinson graduated from Taylor University in 1994 with a BA in Chemistry/Pre-med. He holds a Series 3 license and is a Chartered Alternative Investment Analyst (CAIA) Charter Holder.

BRANDON GILL NEW, CFA

Senior Portfolio Manager, Multi Strategy Investments, OPTrust

Brandon Gill New is a Senior Portfolio Manager in the Capital Markets Group at OPTrust, one of Canada's largest defined benefit pension plans. In her role, Brandon provides strategic direction and oversight over a number of strategies within the plan's portfolio of C$6B externally managed public-markets funds. Prior to joining OPTrust in early 2018, Brandon was a Director at BMO Capital Partners, a proprietary private debt and equity fund at Bank of Montreal. She also spent a decade at Ontario Teachers' Pension Plan. There, she served as a Portfolio Manager in the Alternative Investments Division managing a portfolio of global hedge funds and esoteric investment funds, and as an Assistant Portfolio Manager in the Public Equities Division covering Emerging Markets equities. Brandon serves on the Institutional Asset Management Committee for CFA Society Toronto, as the Fund Development Chair for the Junior League of Toronto, and as a mentor for Women in Capital Markets. Brandon holds an MBA from London Business School and a B.A. in International Economics from Middlebury College in Vermont. She is also a CFA Charterholder.

SPEAKER BIOS

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.

TIM PICKERING

Founder & Chief Investment Officer, Auspice Capital Advisors

Tim Pickering is Founder, President and CIO of Auspice. Tim leads strategic decision making and the vision for Auspice's diverse suite of award-winning rules-based quantitative investment strategies. Tim believes that in the future, non-correlated alternative investments will be a core holding in all portfolios, regardless of investor size or sophistication. Alternatives will no longer be viewed as risky, but as conservative and prudent, given the measurable value to investment portfolios. He is passionate about creating innovative investment strategies and products that the market needs with distribution through reputable partners at a fair price. In 2015, Tim was selected by Alberta Venture Magazine, one of Alberta's most widely respected business publications, as one of Alberta's 50 most influential people. In 2017, Tim was named to the University of Calgary Accounting and Finance Advisory Council and in 2019 became the Chair of the Finance Advisory Council at the Haskayne School of Business. In 2020, Tim was elected to the Board of the Calgary chapter of Pheasants Forever, a globally respected habitat organization dedicated to wildlife, land management, conservation, and education. Prior to forming Auspice, Tim was VP of Trading at Shell (North America). He began his career at TD Securities (Toronto) in their elite trading development program ultimately holding the Senior PM position for the Energy Derivatives portfolio. Outside of Auspice, Tim has been involved in grain farming in Western Canada. Through the founding of Auspice, Tim ties together a career in commodity and financial risk and portfolio management that has spanned institutional experience along with entrepreneurial vision.

MARK RASKOPF, CFA

Portfolio Manager, Head of Tactical Trading Strategies, Russell Investments

Mark joined Russell Investments in 2011 to help build out the custom hedge fund solutions business. He has 25 years of experience in hedge fund manager research and portfolio management across the spectrum of strategies and styles. Mark joined Russell from Ermitage Americas, Inc. where he was a managing director responsible for leading the NY hedge fund team in providing manager research and portfolio management. Prior to Ermitage, Mark held similar positions at M. Safra & Co., Bank of America, Deutsche Asset Management, The Kenmar Group and Winklevoss Consultants. As Portfolio Manager and Head of Tactical Trading Strategies, Mark manages Russell's long-only commodity business where he conducts external manager research and acts as portfolio manager across the Russell commodity funds. Mark also conducts research on hedge fund managers in the quantitative equity and tactical trading sectors, including systematic and discretionary macro strategies, trend-followers and commodity strategies.

SPEAKER BIOS

EDWARD TRICKER, PHD

Chief Investment Officer, Quantitative Strategies, Graham Capital Management

Dr Edward Tricker is Chief Investment Officer of Quantitative Strategies of Graham Capital Management ("GCM"), an alternative investment firm with approximately $18 billion in AUM as of June 1, 2021. He is currently responsible for the management and oversight of the firm's Quantitative Strategies team, including quantitative operations and execution, research, and data science. Dr. Tricker is also a member of the firm's Executive, Investment, and Risk committees. Dr. Tricker joined GCM in June 2011 as a quantitative research analyst. He became an Associated Person of GCM effective February 4, 2013, and a Principal on April 30, 2014. Prior to joining GCM, Dr. Tricker worked at Winton Capital Management, an investment management firm, from October 2008 to March 2011, where he held positions of increasing responsibility concluding as Senior Researcher. He was between employment from April 2011 to May 2011. Dr. Tricker received a Ph.D. in Statistics from Imperial College of Science and Technology in London in October 2009 and a B.S. in Mathematics and Statistics from the University of Oxford in June 2005.

STEVEN WILSON

Director, Stable Value Hedge Funds and ACWI Beta One, Teacher Retirement System of Texas

Steven Wilson is a Director in the Public Markets group at the Teacher Retirement System of Texas, a $179 billion pension system serving 1.7 million active and retired educators and their families. Mr. Wilson is responsible for the $9B Stable Value Hedge Fund Portfolio, which includes allocations to Equity Market Neutral, Macro, Managed Futures, Platform, Credit and Reinsurance Hedge Funds. He is also responsible for the $6B World Equity Portfolio, which includes Beta One strategies benchmarked to global equity indices. Prior to joining TRS, Mr. Wilson was an Investment Director at Ameriprise Private Wealth Advisors, where he oversaw fund selection for $250 million of client assets. Mr. Wilson received an MBA from the Rice University Jones School of Business in 2012, is a graduate of the University of Texas at Austin McCombs School of Business in 2006 and holds the CAIA designation.

IGOR YELNIK

Chief Executive Officer & Chief Investment Officer, Alphidence Capital Ltd.

Igor Yelnik founded Alphidence Capital Ltd in 2020 and holds the positions of CEO and CIO. Previously Igor was the CIO for ADG Capital Management LLP from 2013 to 2019. Prior to that he spent 9 years at IPM, Informed Portfolio Management AB, where he was a Partner and Head of Portfolio Management and Research. Before this, Igor co-founded St. Petersburg Capital, an asset management firm that specialised in the Russian securities market and, later, Unibase Invest, a managed futures business based in Tel Aviv. Igor graduated from Leningrad Polytechnic Institute in 1986 where he obtained a Master's degree in Computer Science (Diploma with Distinction).

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