



TALKING HEDGE



NASHVILLE 2024

ALTERNATIVE INVESTMENT SOLUTIONS
DRIVE ALPHA IN A NEW MARKET REGIME

PLUS

EVOLVING MANAGERS & INVESTORS EXCHANGE

DECEMBER 4-5, 2024 - NOELLE NASHVILLE

CONFERENCE GUIDE

CONFERENCE SPONSORS





Welcome to Talking Hedge Nashville! We're thrilled to bring together hedge fund managers, solutions providers, and hedge fund allocators for deep discussions on innovative, non-correlated, active strategies designed to improve outcomes in global investments. Thank you for joining us!

In an increasingly volatile world, global market uncertainties persist, and risk management challenges intensify. Customized alternative investment solutions offer diversification benefits that are essential to protecting and growing assets. Today we'll explore creative strategies and solutions specifically designed for institutional investors to help mitigate risk and harvest new sources of alpha.

We're also delighted to host our first *Evolving Managers & Investors Exchange*, a luncheon and program curated for allocators seeking access to evolving/early-stage strategies and fresh ideas.

Talking Hedge partners with leading hedge fund managers and solutions providers to create a substantive agenda that focuses on actionable solutions designed to improve risk management and boost performance overall. Our agenda also allows ample time to network. Please note that we operate under Chatham House Rule.

We are honored this year to partner with the following esteemed organizations to create a timely and robust program for you:

Fidelity Investments, Galaxy Plus, Lighthouse Partners, StoneX Group, Welton Investment Partners, Wilshire, Asset Management One, Golden Eagle Strategies, Graham Capital Management, HedgeFacts, Metori Capital Management, Mulvaney Capital Management, O'Brien Investment Group, PivotalPath, RCM Alternatives, Transtrend, UBS, and Zweig-DiMenna Associates.

Hats off to our speakers for their willingness to share their insights and outlooks with you. It's an honor for us to assemble such a preeminent speaking faculty, and we hope you find the agenda both insightful and inspiring.

Sincere thanks to our association partners: AIMA, CAASA, CAIA, IMDDA, and QWAFaxNEW.

We hope you enjoy your time together at Talking Hedge in the great city of Nashville!

Meg Bode
Founder

CONFERENCE PROGRAM

WEDNESDAY, DECEMBER 4

12:00 -4:00

EVOLVING MANAGERS & INVESTORS EXCHANGE, LUNCHEON & PROGRAM

Manager Presentations:

Fidelity Investments: Seth Gold
Portfolio Manager, Convertible Arbitrage

Golden Eagle Strategies: Robert Zuccaro, CFA
Founder & Chief Investment Officer

Welton Investment Partners: William Marr
Senior Managing Director

Zweig-DiMenna Associates: Michael Schaus & Matthew Finkelstein
Chief Investment Officer and Portfolio Manager

What Allocators Look For in Evolving Managers

Moderator: Joseph Mooney
Executive Director, UBS

Panelists: Jonathan Caplis
Chief Executive Officer, PivotalPath

Christophe L'Ahelec, CFA
Managing Director, Head of Active Public Markets, University Pension Plan Ontario (UPP)

Marc Lorin
Chief Investment Officer, Galaxy Plus

Jeff Malec, CAIA
Managing Director and Partner, RCM Alternatives

Justin Young, CAIA
Director of Investments, Multilateral Endowment Management Company (MEMCO)

5:00 – 7:00

WELCOME RECEPTION

THURSDAY, DECEMBER 5

7:00-8:00

NETWORKING BREAKFAST

8:15-8:30

WELCOME REMARKS

8:30-9:15

A LOOK FORWARD: MINING FOR ALPHA WITH HEDGE FUNDS

Moderator: John Holton, CAIA
Vice President, Alternatives Manager Research, Wilshire

Panelists: Seth Gold
Portfolio Manager, Convertible Arbitrage, Fidelity Investments

Rob Lingle
Managing Director, Merus Advisors

Michael Schaus
Chief Investment Officer, Zweig-DiMenna Associates

9:15-10:00

THE ART & SCIENCE OF PORTFOLIO CONSTRUCTION: WHERE THE RUBBER MEETS THE ROAD

Moderator: Herman Laret
Principal, Laret Capital Partners

Panelists: John Fidler
Chief Investment Officer, Wealth Management & Trust, Stock Yards Bank & Trust

Luke Hinshelwood
Managing Partner, Middlemark Partners

Marc Lorin
Chief Investment Officer, Galaxy Plus

10:00-10:30

NETWORKING BREAK

CONFERENCE PROGRAM

- 10:30-11:15 **EVALUATING DISCRETIONARY DECISIONS IN A SYSTEMATIC INVESTMENT PROCESS**
- Moderator: Sam Kavehrad, CAIA
Research Consultant, Principal, RVK, Inc.
- Panelists: Nicolas Gausssel, PhD
President & Co-Chief Investment Officer, Metori Capital Management
- Jeff Malec, CAIA
Managing Director & Partner, RCM Alternatives
- Joris Tolenaar, CFA
Strategy Specialist, Transtrend
- 11:15 –12:00 **NEXT GEN CUSTOMIZATION AND THE QUANT ADVANTAGE**
- Moderator: Jonathan Caplis
Chief Executive Officer, PivotalPath
- Panelists: Michael Hillman, CFA, CAIA
Vice President, External Investing Group (XIG), Alternative Investment
Manager Selection, Goldman Sachs Asset Management
- Anne-Sophie van Royen, PhD
Chief Investment Officer, Quantitative Strategies, Asset Management One
- 12:00-1:00 **NETWORKING LUNCH**
- 1:15-2:15 **THE VALUE OF LIQUIDITY IN INVESTOR PORTFOLIOS**
- Moderator: Sladja Carton
Institutional Portfolio Manager, Liquid Alternatives, Fidelity Investments
- Panelists: Ronan Cosgrave, CFA
Partner, Albourne America LLC
- Anders Hall, CFA
Vice Chancellor for Investments, Chief Investment Officer, Vanderbilt University, Office of Investments
- Christophe L'Ahelec, CFA
Managing Director, Head of Active Public Markets, University Pension Plan Ontario (UPP)
- 2:15 –3:00 **A FRESH LOOK AT MACRO AND RISK MITIGATION STRATEGIES**
- Moderator: Jackie Rosner
Managing Director, PAAMCO Prisma
- Panelists: Oren Rosen, PhD, CAIA
Portfolio Manager, Systematic Macro & Trend Strategies, Welton Investment Partners
- Eric Worley
Global Head of Business Development, Mission Crest Capital Management
- Justin Young, CAIA
Director of Investments, Multilateral Endowment Management Company (MEMCO)
- 3:00 – 3:30 **NETWORKING BREAK**
- 3:30 – 4:15 **HARNESSING THE POWER OF MANAGED FUTURES: THE TIME IS NOW**
- Moderator: Clayton Passero
Managing Director, Head of Futures Online, StoneX Group
- Panelists: Peter Madsen
Director, Chief Investment Officer, Utah School and Institutional Trust Funds Office (SITFO)
- Paul Mulvaney
Chief Investment Strategist, Mulvaney Capital Management
- Michael Stendler
Managing Director, O'Brien Investment Group
- 4:15 – 6:00 **CLOSING COCKTAILS & NETWORKING**

SPEAKER BIOS



JONATHAN CAPLIS

Chief Executive Officer, PivotalPath

Mr. Caplis serves as PivotalPath's CEO and member of the Board of Directors. PivotalPath is a hedge fund research firm working with a range of global hedge fund allocators. PivotalPath works closely with its clients to benchmark existing hedge fund portfolios and add to their hedge fund investments. In his 10 years of direct hedge fund experience, Mr. Caplis served as co-head of portfolio allocation and risk management at Campbell & Co., a multi-billion dollar hedge fund and was a member of the IC. Prior to Campbell & Co., he was co-founder and COO of Global Domain Partners LLC, a systematic hedge fund. Mr. Caplis began his career as an analyst at Chesapeake Partners LP, a large event-driven hedge fund. He holds a B.S.B.A in Finance from Washington University in St. Louis.



SLADJA CARTON

Institutional Portfolio Manager, Liquid Alternatives, Fidelity Investments

Sladja Carton is senior vice president, alternatives institutional portfolio manager at Fidelity Investments. Fidelity Investments is a leading provider of investment management, retirement planning, portfolio guidance, brokerage, benefits outsourcing, and other financial products and services to institutions, financial intermediaries, and individuals. In this role, Ms. Carton works closely with the investment teams, product teams and distribution channels to support, enhance and expand Fidelity's growing suite of liquid alternatives products and solutions. Prior to joining Fidelity in 2023, Ms. Carton was the global head of strategic development at Asset Management One USA Inc., a subsidiary of Mizuho Financial Group and Daichi-Life, where she led the effort to implement and grow a quantitative investment platform providing products and solutions to institutional clients. She also worked at R.G. Niederhoffer Capital Management as the executive managing director, heading business building initiatives and managing operations, risk, and compliance teams. She started her career at Donaldson Lufkin & Jenrette in investment banking in 1993. Ms. Carton has over 25 years of experience in alternative investments. Ms. Carton earned her bachelor's degree from Middlebury College.



RONAN COSGROVE, CFA

Partner, Albourne America LLC

Ronan Cosgrave is a Partner at Albourne and is jointly responsible for Investment Due Diligence on the Global Multi-Strategy and Convertible Arbitrage spaces. Prior to Albourne, Ronan was a Managing Director and Partner at PAAMCO Prisma, where he had several responsibilities including developing and managing an LDI strategy; allocation to the convertible arbitrage, credit relative value and volatility arbitrage spaces; and management of several institutional client relationships. He has also worked at IBM, Intrawest Corp and ProsCon (Rockwell Automation). He holds an MBA from Columbia Business School, a B.Eng. in Chemical and Process Engineering from Munster Technological University, the Certificate in Quantitative Finance (CQF) and is a CFA Charter holder.

SPEAKER BIOS



JOHN FIDLER

Chief Investment Officer, Wealth Management & Trust, Stock Yards Bank & Trust

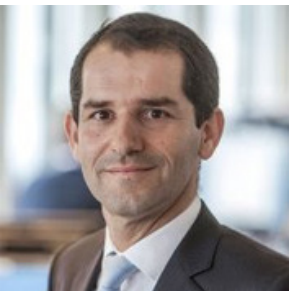
John Fidler is the Chief Investment Officer at Stock Yards Bank & Trust, where he oversees the development of investment strategy and asset allocation for high-net-worth and institutional clients. As a seasoned investment professional with over 20 years of experience, John brings a wealth of knowledge and expertise to his role. Prior to joining Stock Yards Bank & Trust in 2016, John served as the Director of Alternative Investments at Commonwealth Bank & Trust Company. His extensive background in the hedge fund industry and his experience as a Portfolio Manager for a private investment office have equipped him with a deep understanding of various investment strategies and asset classes. John's career began at AIG, where he honed his skills in risk management. He has since held positions at prestigious firms such as Fox-Pitt, Kelton and North End Option Strategies, gaining valuable experience in research analysis and trading. A graduate of Washington & Lee University with BS in Business Administration with Special Attainments in Commerce, John is dedicated to his profession and passionate about delivering exceptional investment solutions to his clients. He currently serves on the Board of Directors of Pillar and the Cabbage Patch Settlement House and the Vestry of Grace Anglican Church. When not immersed in his work, John enjoys spending time with his family, supporting his three children in their various sports and social activities.



MATTHEW FINKELSTEIN

Portfolio Manager, Zweig-Di-Menna Associates

Matthew Finkelstein was a Senior Analyst under Martin Zweig from 1996, until the latter's passing in 2013. He worked closely with Dr. Zweig and continues this strong collaboration with Michael Schaus and Kang Wang on market research across multiple assets. Since 2006 he has worked at Zweig-DiMenna as a market strategist, as well as on portfolio management for the firm pension fund, where he combines his real-world investment experience with a robust data science background. He attended the University of Pennsylvania's Jerome Fisher Program in Management & Technology, receiving a B.S. in Finance from the Wharton School, as well as a B.S.E. in Computer Science and Engineering. He also holds an M.B.A. in Finance and Information Systems from New York University's Stern School of Business. He has furthered his professional development with classes from MIT in computer science, Python, data science, and machine learning. Matthew has 26 years of market experience.



NICOLAS GAUSSEL, PHD

President & Co-Chief Investment Officer, Metori Capital Management

Nicolas has 20 years of experience in finance, including 15 years in portfolio management. Before founding Metori, he was the Chief Investment Officer of Lyxor, supervising more than 100 managers, researchers and analysts. He previously held various management positions, notably in Asia. Nicolas is an engineer graduated from the Ecole Centrale de Paris, and holds a PhD in economics from the Sorbonne. He has regularly taught finance courses in several Master programs (including ENSAE and ESSEC), and contributed to academic publications and conferences.

SPEAKER BIOS



SETH GOLD

Portfolio Manager, Convertible Arbitrage, Fidelity Investments

Seth Gold is a portfolio manager in the Arbitrage and Hedging Solutions group at Fidelity Investments. Fidelity Investments is a leading provider of investment management, retirement planning, portfolio guidance, brokerage, benefits outsourcing, and other financial products and services to institutions, financial intermediaries, and individuals. Arbitrage and Hedging Solutions is an investment team within Fidelity's Asset Management Solutions division, an investment organization that provides industry-leading multi-asset solutions and liquid alternatives investment capabilities to the retail and institutional marketplace. In this role, Mr. Gold serves as portfolio manager for the Convertible Arbitrage Fund. Mr. Gold has over fifteen years of experience in convertible bonds, both on the sell-side and buy-side in research, investment banking, trading, and portfolio management. Most recently Seth was a portfolio manager at Westwood Holdings Group, where he was trading and managing a convertible arbitrage strategy. He has been in the industry since 2007. Mr. Gold earned his bachelor of arts degree in economics and business from Kalamazoo College and his master of business degree from Columbia Business School.



ANDERS HALL, CFA

Vice Chancellor for Investments & Chief Investment Officer, Vanderbilt University, Office of Investments

Anders is Vanderbilt University's Vice Chancellor for Investments and Chief Investment Officer, overseeing the management of the university's \$10.4 billion endowment. He joined Vanderbilt in 2013 from Duke University, where he led the endowment's public investments team investing in public equities, hedge funds, commodities, and bonds. Prior to Duke, Anders was an investment consultant with Hewitt Investment Group, advising institutional clients including endowments and corporate pension plans. Anders holds a BA in Economics and Public Policy Studies from Duke and an MBA in Economics and Finance from NYU's Stern School of Business. He is a CFA charterholder and serves on several boards, including the Pi Kappa Phi Foundation, Rock the Street Wall Street, the Healing Trust, and the Greater Nashville Venture Capital Association.



MICHAEL HILLMAN, CFA, CAIA

Vice President, External Investing Group (XIG), Alternative Investment Manager Selection, Goldman Sachs Asset Management

Michael Hillman is a vice president in the External Investing Group (XIG) within Goldman Sachs Asset Management where he is a senior member of the client portfolio solutions and hedge fund strategies team. In this capacity, he works with institutional clients and the portfolio management team to design skill-based solutions for clients. He heads coverage for North American institutional investors and is responsible for client portfolio management and product strategy and development. He joined Goldman Sachs as part of Goldman Sachs Asset Management's 2018 acquisition of Aptitude Investment Management. In his previous capacity at Aptitude, Michael led the firm's business development and client relations efforts. Prior to that, he worked at Northern Lights Capital Group, Morgan Stanley Investment Management, and Orca Bay Partners. He has 20 years of investment industry experience. He received a BA in Economics from the University of Washington and an MBA with a concentration in Finance from the University of Washington's Foster School of Business. He is a CFA charterholder and CAIA charterholder.

SPEAKER BIOS



LUKE HINSHELWOOD

Managing Partner, Middlemark Partners

Luke is the Managing Director of Middlemark Partners. He works and consults both with emerging fund managers in the alternatives space and institutional allocators. Partnering closely with the firm's Head of Advisory & Pensions on all client-related matters and each mandate, from bespoke emerging manager searches to building risk mitigation solutions and portfolios or deploying new Managed Account programs to help Pension Funds and other types of clients achieve the best net results from their hedge fund allocations. Luke also works closely with select alternative investment strategies and Middlemark's senior partners to conduct capital-raising exercises for emerging managers. Before working in the alternative investment industry, Luke worked in commercial banking in Washington, D.C.. He earned a Bachelor of Science in Mathematics and Economics from Centre College in Kentucky and The University of Richmond, Virginia.



JOHN HOLTON, CAIA

Vice President, Alternatives Manager Research, Wilshire

John Holton is a Vice President with Wilshire and a member of the Alternatives Manager Research team. John joined Wilshire in 2015 and currently has nine years of industry experience. He earned a BA in Economics from Pepperdine University in Malibu, California, and is a Chartered Alternative Investment Analyst®.



SAM KAVEHRAD, CAIA

Research Consultant, Principal, RVK, Inc.

Sam works with a wide variety of institutional allocators on hedge fund and public markets manager selection, portfolio construction, asset allocation, and risk management practices. He joined RVK in 2014 and has been a Principal at the firm since 2020. With over \$2T in assets under advisement, RVK provides strategic consulting services to institutional investors including government entities, unions, corporations, endowments, and foundations.



CHRISTOPHE L'ACHELEC, CFA

Managing Director, Head of Active Public Markets, University Pension Plan Ontario (UPP)

Christophe L'Ahelec is an investment professional with more than twenty years of global experience in France, Hong Kong, Switzerland, and Canada. As Managing Director, Head of Active Public Markets, he is responsible for UPP's global investment strategy with a particular focus on Active Public Market activities, including Public Equity, Public Credit and Absolute Return Strategies. Christophe is a graduate engineer in Finance and Applied Mathematics from the ENSIMAG, France and holds the Chartered Financial Analyst® designation.

SPEAKER BIOS



HERMAN LARET

Principal, Laret Capital Partners

Prior to starting his own firm in hedge fund consulting and capital raising Herman Laret spent nine years at Titan Advisors, where he was a Partner and Head of Titan's Global Macro, Commodity Trading & Multi-Strategy team. He also served on the firm's Investment Committee and was head of analytics. Before joining Titan Advisors, he was a managing director at Credit Suisse in global macro product sales. He held positions that included co-head of interest rate sales and treasury product manager. During his 14 years with Credit Suisse, he was on the firm's Proprietary Fund Investment Committee, responsible for investing the firm's capital in hedge funds. Before joining Credit Suisse, Herman was a partner and senior portfolio manager at MKP Capital Management in New York, trading a G10 relative value rates products strategy. He began his career at Salomon Brothers International in London, working in M&A before moving to New York to trade Government bonds for the firm. Herman holds a degree in medicine from Leiden University in the Netherlands.



ROB LINGLE

Managing Director, Merus Advisors

Rob joined Merus Advisors in 2022 to assist with building awareness of the firm's alternative investment advisory services for high-net-worth clients as well as sourcing new investment opportunities. He has over 40 years of experience in multiple segments of the financial industry. Prior to working with Merus, he was a Managing Director with Capital Growth Advisors. Previously, he held a similar position with Asset Alliance. He was the Director of Marketing for Northfield Trading, and prior, Tactical Investment Management, both alternative investment managers. He was the president of a futures brokerage company and a branch manager of a regional securities firm. Prior to this Rob was an Associate Trader at Commodities Corporation and managed money as a Commodity Trading Advisor. He began his career in brokerage at Merrill Lynch and Shearson Lehman Brothers. He graduated from the University of Southern California with a dual degree in Economics & International Relations. He is an active equities and futures trader in addition to an investor in a variety of alternative investment funds.



MARC LORIN

Chief Investment Officer, Galaxy Plus

Mr. Lorin joined the sponsor in December 2020. Mr. Lorin has been in the alternative investment and financial services industry for over 30 years with experience in investment management, structuring, and institutional sales focused on managed futures and global macro hedge fund strategies. His sales were focused on pension funds, sovereign wealth funds, managed account platforms, fund of hedge funds, and family offices. Mr. Lorin concentrates on manager and investor outreach, as he works to connect investors with managers that fit their needs. With his experience in sales of managed futures and global macro hedge fund strategies, Mr. Lorin assists in the investment due diligence process for Asset Management, a boutique investment manager with a focus on building alternative multi-manager portfolios for Family Offices and other institutional investors. Previously, Mr. Lorin was Director of Strategic Relationships, Coquest Advisors; President and Co-CIO, Liquid Strategies; and Acting Head of the Americas Alternative Investment Solutions Team, NewEdge USA (a division of Société Générale). Mr. Lorin holds a B.S. Finance- University of Florida's Warrington School of Business.

SPEAKER BIOS



PETER MADSEN

Director, Chief Investment Officer, Utah School and Institutional Trust Funds Office (SITFO)
Peter was brought on by SITFO in 2015 and was critical in establishing the direction of the organization. Working in the investment management industry since 1999, his experience includes Managing Director of Cube Capital, an investment group in London and a range of experience in global investing for large institutional clients such as pension funds and endowments, as well as permanent school fund experience from another state. Peter holds a Bachelor of Arts degree from the University of Utah in Russian with an emphasis on International Political Economy. He also holds an MBA focused on International Finance from the Middlebury Institute of International Studies.



JEFF MALEC, CAIA

Managing Director & Partner, RCM Alternatives

Mr. Malec has spent 25+ years in the futures industry, from his days as a clerk in the bond futures pits, to manager of multiple commodity-based hedge fund products, to host of RCM's popular alternative investment podcast, the Derivative. Prior to RCM, Mr. Malec was the founder and CEO of Attain Capital Management, which merged with RCM after 13 years assisting clients with alternative investments. He is the great grandson of Harley Davidson founder Walter S. Davidson, and a former board member of the National Futures Association. He holds the Chartered Alternative Investment Association (CAIA) designation and has authored hundreds of white papers covering alternative investments.



WILLIAM MARR

Senior Managing Director, Welton Investment Partners

Bill leads Welton Investment Partners' business development efforts, delivering the firm's investment solutions to the institutional and wealth management segments globally. In previous roles he led due diligence and allocated to Hedge Funds and CTAs, including as Global Head of Hedge Fund Research at Merrill Lynch Global Wealth Management. Bill also headed Alternative Investments at Zurich-based Bank Julius Baer and Boston-based State Street Global Advisors. Prior to joining Welton, he founded and managed Granite Street Capital, a consultancy focused on developing and implementing growth strategies for alternative investment managers.



JOSEPH MOONEY

Executive Director, UBS

Joe has been a senior member of the UBS Execution and Clearing Sales team in New York since 2015. His client focus is on the Quantitative and Systematic Hedge Funds, Asset Managers and Pension space. Prior to joining UBS, Joe managed Electronic Trading desks for two Global FCMs. He began his career with Dean Witter at the Chicago Board of Trade in Chicago. Joe holds a Bachelor of Arts in History from Lynchburg University, Lynchburg, VA. He holds Series 3, 7, 55 and 63 licenses. Joe resides in Westchester County, NY, spending his nonworking hours focused on his family, racquet sports and supporting Detroit sports teams.

SPEAKER BIOS



PAUL MULVANEY

Chief Investment Strategist, Mulvaney Capital Management

Paul Mulvaney graduated from Manchester University in 1985 with a First Class Honours degree in Computer Science & Mathematics. He completed the one-year Management Science program at Imperial College, London in 1986, earning an MSc with Distinction. The focus of his Master's thesis was computerized arbitrage models for interest and exchange rate trading. After university, Paul held posts in derivatives and foreign exchange trading at Midland Montagu, Bankers Trust Company and NatWest Markets before joining Merrill Lynch in September 1993. At Merrill Lynch he managed several of the firm's major options portfolios, including Global Foreign Exchange Options and Exotic Commodity Options. Mr. Mulvaney left Merrill Lynch in 1999 in order to found Mulvaney Capital.



CLAYTON PASSERO

Managing Director, Head of Futures Online, StoneX Group

Clayton Passero is the Managing Director and Head of Futures Online at StoneX Group Inc., with over a decade of leadership in the financial services industry. Throughout his career, Clayton has held key leadership roles, overseeing business development as well as clearing and execution services for retail, institutional, and professional clients, including proprietary trading groups, hedge funds, and asset managers. His deep expertise in market access, client relationships, and strategic negotiation with industry leaders positions him as a trusted voice in the futures market. Clayton holds a degree in Business Management and Finance from Purdue University and maintains Series 3 and Series 30 certifications.



OREN ROSEN, PHD, CAIA

Portfolio Manager, Systematic Macro & Trend Strategies, Welton Investment Partners

Oren manages the research, design, and implementation of Welton's Systematic Macro and Trend strategies, and oversees the strategy allocation process underlying the firm's futures and FX-based products. He also serves as an investment committee member and a point of contact for clients. Before joining Welton in 2011, Oren worked as a Senior Application Engineer for MathWorks focused on mathematical optimization, statistics, time series analysis, and high-performance computing. Oren earned a PhD and an MA in Mathematics from the University of California, Santa Cruz, a BS in Mathematics from the University of New Hampshire, and also holds the CAIA designation.

SPEAKER BIOS



JACKIE ROSNER

Managing Director, PAAMCO Prisma

Jackie Rosner joined PAAMCO Prisma (previously KKR Prisma) in 2013 and is a Managing Director and member of the Portfolio Management team, with a specific focus on global macro, relative value, fixed income, managed futures, and quantitative strategies. Prior to joining Prisma, Mr. Rosner was a Managing Director, head of global macro and systematic trading strategies, and a member of the executive committee at Union Bancaire Privee Asset Management in New York. Prior to UBP, Mr. Rosner was a proprietary trader at BNP Paribas in New York. Mr. Rosner has also been a portfolio manager at both Archeus Capital Management and Millennium Partners. He was a founding member of a proprietary trading desk in the fixed income department of Chase Manhattan Bank/J.P. Morgan. Mr. Rosner began his career at Salomon Brothers (Citibank) where he held various positions of increasing responsibility primarily focused on quant, trading, and fixed income strategies. Mr. Rosner is on the advisory board for the MIT Sloan Department of Finance, volunteers as a master's thesis supervisor at the Department of Mathematics at NYU Courant, and had guest lectured at Columbia University's Department of Financial Engineering. Mr. Rosner holds a B.S. in Economics, a B.S. in Management Science, and an M.Sc in Management from the Sloan School of Management at Massachusetts Institute of Technology. He also holds an M.Sc in Mathematical Finance from New York University and completed the following designations: CFA, CAIA, CMT, and FRM.



MICHAEL SCHAUS

Chief Investment Officer & Portfolio Manager, Zweig-DiMenna Associates

Michael Schaus was Director of Market Research directly under Martin Zweig at Zweig-DiMenna Partners L.P. for 21 years from 1992 until Martin's death in 2013. He worked with Marty Zweig extensively on research projects focusing on macroeconomic, monetary and technical variables in models to assess market risk through exhaustive quantitative studies. Since 2007 he worked on portfolio management, applying the research through investments in individual equities and equity indices, commodity and fixed income futures contracts. He is currently Director of Market Research for both Zweig-DiMenna Partners L.P. and Brenton Point Wealth Advisors LLC. Previously, Mr. Schaus worked as a credit analyst at First American Bank in Washington, D.C. He holds a B.A. in Government from Georgetown University and an M.B.A. magna cum laude in Finance from the Graduate School of Business of Columbia University. Michael has been involved with markets for 32 years.



MICHAEL STENDLER

Managing Director, O'Brien Investment Group

Michael has been in the commodity trading, traditional, and alternative investment management business since 1984. Currently, Michael serves as a Managing Director and Investment Committee Member of Chicago based O'Brien Investment Group (since 2016). He began his career with 6 years at a brokerage firm as a VP and Director of Mutual Fund and later as a VP at a \$4 Billion small cap value firm. In 2003, he shifted his focus to the global macro trading/managed futures sector. Michael has a Series 3 and 30 License. He received a BS – Finance degree from Concordia University – Wisconsin in 1983.

SPEAKER BIOS



JORIS TOLENAAR, CFA

Strategy Specialist, Transtrend

Joris has been a member of Transtrend's Investor Relations team since 2009. He works closely with the R&D team to keep investors informed. Joris has more than 25 years of experience in investments, there where math and business meet. Before joining Transtrend, he researched and traded equity derivatives at ABN AMRO. Joris has a Master's Degree in Business Econometrics from Erasmus University Rotterdam and is a CFA charterholder. Joris is an ironman enthusiast. When the going gets tough, he gets going. Knowing that the whole is more than the sum of parts.



ANNE-SOPHIE VAN ROYEN, PH.D.

Chief Investment Officer, Quantitative Strategies, Asset Management One USA

Anne-Sophie van Royen serves as Asset Management One USA's Chief Investment Officer, Quantitative Strategies. She is responsible for overseeing all aspects of the firm's quantitative investment programs including the research process, portfolio management and trade execution. Dr. van Royen manages AMO USA's quantitative investment team. Prior to joining AMO, Ms. van Royen worked at la Caisse de Depot et Placement du Quebec in Montreal, first as Head of Global Tactical Asset Allocation then as Head of Quantitative Equity. Prior to CDPQ she served for 4 years as an Advisor in the Managing Director's Office at the Abu Dhabi Investment Authority, covering all matters pertaining to Tactical Asset Allocation. She was previously Head of Global Tactical Asset Allocation at Credit Suisse Asset Management in New York between 2004 and 2011. She began her career in Mergers and Acquisitions with Goldman Sachs in London. Ms. van Royen hold a Ph.D and M.Sc in Mathematical Economics from the University of Paris – Sorbonne. She also holds a B.A in Psychology and an M.A. in Business from HEC Paris. She has published articles in a variety of professional investment journals, including the Financial Analysts Journal, Journal of Portfolio Management, Journal of Derivatives and Journal of Forecasting. She is a Past President of the Society of Quantitative Analysts in New York and served as an advisor in the Department of Mathematics at the New Jersey Institute of Technology.



ERIC WORLEY

Global Head of Business Development, Mission Crest Capital Management

Eric is responsible for overseeing the sourcing and selection of traders and PM Teams for Mission Crest. Prior to joining Mission Crest Capital in 2024, Eric spent nearly four years as the Trading Group Head at Kershner Trading Group, where he managed a team of commodities traders. Prior to his time at Kershner, Eric was a proprietary trader at Gelber Group for nearly seven years where he focused on fundamental and technical strategies within European and U.S. equity indices. Before that, Eric was a proprietary trader at HTG Capital Partners where he focused on trading macro products with an emphasis on equity indices. Eric received his B.S. in Communication from Northwestern University.

SPEAKER BIOS



JUSTIN YOUNG, CAIA

Director of Investments, Multilateral Endowment Management Company (MEMCO)

Justin Young is a Director of Investments at MEMCO where he is responsible for portfolio construction and manager selection across client portfolios. He has a special focus on uncorrelated strategies to help meet client needs in a wide range of market scenarios. Prior to joining MEMCO, Justin spent 11 years at the \$40bn South Carolina Retirement System Investment Commission where he ended his tenure as Director of Portable Alpha, managing the \$5bn hedge fund program which was named 2022 Public Plan of the year by Institutional Investor. During his time as Director the portfolio's performance was in the top 5% of all other public pensions while also maintaining bottom decile risk and beta, and generated over \$1.4bn in excess returns since it was implemented in 2016. In addition to hedge funds, he also spent time covering Fixed Income, GTAA, Equity Options and Commodity allocations at RSIC. Justin began his career as a Research Analyst at Bridgewater associates where he worked with their global equities team. He graduated from the University of South Carolina Honors College where he majored in finance and economics. Justin is also a CAIA Charterholder.



ROBERT ZUCCARO, CFA

Founder & Chief Investment Officer, Golden Eagle Strategies

Robert Zuccaro is the Founder & CIO of Golden Eagle Strategies. Over the course of his 40 year investment management career, Robert has managed market leading institutional portfolios and two mutual funds. He is one of the most successful investment managers having been named a top 10 manager in numerous years by the Wall Street Journal, Business Week, and Investor's Business Daily. He's also been cited for outstanding performance by leading publications including Financial World, New York Times, and USA Today. Robert began his career at E.W. Axe & Co managing the flagship Axe-Houghton Stock Fund, which outperformed the S&P 500 for six straight years under his management. As an early pioneer in applying statistical analysis to portfolio management, Robert's research has focused on identifying the common statistical threads of top performing stocks. Golden Eagle Strategies represents the culmination of four decades of research and expertise honed over the course of 10 bull and 9 bear markets. His research has revealed unconventional truths that drive the performance of the Golden Eagle Growth Strategy. As a prolific researcher, life-long educator and philanthropist, Robert has authored numerous studies, market commentaries, and the book, "How Wall Street Reshaped America's Destiny". He holds an MBA from Pace University.

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