



TALKING HEDGE



AUSTIN 2025

OPTIMIZING THE ROLE OF HEDGE FUND

STRATEGIES IN A TOTAL PORTFOLIO

PLUS

EVOLVING MANAGERS & INVESTORS EXCHANGE

MAY 20-21, 2025 - HOTEL ELLA

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the hedge fund journal



Welcome to Talking Hedge Austin 2025! It's our 9th annual conference in Austin, and we're delighted to bring you all together to ponder the investment landscape and share ideas on how to optimize outcomes for investors. This year our conference theme is *Optimizing the Role of Hedge Fund Strategies in a Total Portfolio*.

The role and use of hedge funds in an institutional portfolio continue to evolve as global economies, markets, and geopolitical forces shift, causing sophisticated investors' risk mitigation imperatives to skyrocket. Optimizing the use of alternative strategies to answer specific needs in a portfolio, such as liquidity challenges and capital efficiencies, has given rise to an abundance of innovations created by asset managers and solutions providers. Needless to say, there's plenty to talk about!

Talking Hedge gathers institutional asset owners, allocators, asset managers, solutions providers, and academics in a private setting to examine both challenges and opportunities. Please note that we operate under Chatham House Rule.

We partner with leading hedge funds and solutions providers to create a forward-looking agenda that focuses on actionable solutions designed to unearth new sources of alpha while focusing on risk mitigation for institutional portfolios. Our agenda also allows ample time to network.

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

Blockstream Asset Management, Fidelity Investments, Asset Management One USA, GCM Grosvenor, Investcorp-Tages, Lighthouse Group, New Hyde Park Alternative Funds, One River Capital Management, StoneX Group, Wilshire, Axonic Capital, Capstone Investment Advisors, Crabel Capital Management, Graham Capital Management, HedgeFacts, Logica Capital Advisers, Metori Capital Management, Mission Crest Capital Management, O'Brien Investment Group, PivotalPath, RCM Alternatives, Terreplein Investment Management, UBS, and Zweig-DiMenna Associates.

It's an incredible honor for us to assemble such an outstanding group of speakers for you, and we are grateful for their enthusiasm to share their expertise. We hope you find our presentations inspiring and that they spark new ideas and partnerships for you.

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

We hope you enjoy spending time together!

Meg Bode
Founder

CONFERENCE PROGRAM

TUESDAY, MAY 20

12:00-4:00

EVOLVING MANAGERS & INVESTORS EXCHANGE, LUNCHEON & PROGRAM

Manager Presentations:

Asset Management One USA: Anne-Sophie van Royen, PhD
Chief Investment Officer, Quantitative Strategies

Axonic Capital: Deniz Cicek
Principal, Portfolio Manager

Fidelity Investments: Seth Gold
Portfolio Manager, Convertible Arbitrage

One River Asset Management: Patrick Kazley
Solutions Portfolio Manager

Terreplein Investment Management: Matthew Piselli
Chief Investment Officer

What Allocators Look for in Evolving Managers:

Moderator: Joseph Mooney
Executive Director, UBS

Panelists: John Hynes
Chief Executive Officer, HedgeFacts

Panayiotis Lambropoulos, CFA, CAIA, FRM
Portfolio Manager – Hedge Funds, Employees Retirement System of Texas

Jeff Malec, CAIA
Managing Director and Partner, RCM Alternatives

Jackie Rosner
Managing Director, PAAMCO/Prisma

5:00-7:00

Welcome Reception, Ella Pool Courtyard, Ella Hotel

WEDNESDAY, MAY 21

7:00-8:00

NETWORKING BREAKFAST

8:00-8:15

WELCOME REMARKS

8:15-9:15

LEVERAGING TOTAL PORTFOLIO PRINCIPLES TO COMPOUND BETTER

Moderator: Zachary Driscoll, CFA
Managing Principal, Research Consultant, MALTS, Meketa Investment Group

Panelists: Bradley Davis, CFA
Senior Portfolio Manager, Texas Treasury Safekeeping Trust Company

Wayne Himelsien
President & Chief Investment Officer, Logica Capital Advisers

Patrick Kazley
Solutions Portfolio Manager, One River Asset Management

Markian Zyga, CFA
Chief Investment Officer, Mission Crest Capital Management

9:15-10:15

WHERE TO FIND DIVERSIFICATION IN TODAY'S MARKET ENVIRONMENT: ASSET CLASS, GEOGRAPHY, STRATEGY

Moderator: Jonathan Feeny
Managing Director, Investcorp-Tages

Panelists: Jonathan Caplis
Chief Executive Officer, PivotalPath

Guillaume Jamet, PhD
Principal Manager & Co-Chief Investment Officer, Metori Capital Management

Nick Maffeo, CAIA
Director of Hedge Funds, Employees Retirement System of Texas

Anne-Sophie van Royen, PhD
Chief Investment Officer, Quantitative Strategies, Asset Management One

10:15-10:45

NETWORKING COFFEE AND SNACKS

10:45-11:30	<p>FROM SILO TO SOLUTION: UNLOCKING HEDGE FUND SOLUTIONS IN PORTFOLIO DESIGN</p> <p>Moderator: Jordan Cipriani Senior Consultant, Principal, Director of East Coast Consulting, RVK, Inc.</p> <p>Panelists: McKenna (Phillips) Begala, CFA, CAIA Senior Associate, Teacher Retirement System of Texas</p> <p>Jens Foehrenbach, CFA President and Co-Chief Investment Officer, Graham Capital Management</p> <p>Peter van Dooijeweert Head of Strategic Investment Partnerships, Capstone Investment Advisors</p>
11:30-12:30	<p>GAINING CONVICTION AMIDST MARKET CHAOS</p> <p>Moderator: Jackie Rosner Managing Director, PAAMCO Prisma</p> <p>Panelists: Panayiotis Lambropoulos, CFA, CAIA, FRM Portfolio Manager – Hedge Funds, Employees Retirement System of Texas</p> <p>Matthew Piselli, PhD Chief Investment Officer, Terreplein Investment Management</p> <p>Michael Schaus Chief Investment Officer & Portfolio Manager, Zweig-DiMenna Associates</p> <p>Michael Stendler Managing Director, O'Brien Investment Group</p>
12:30-1:30	<p>NETWORKING LUNCHEON</p>
1:30-2:15	<p>BITCOIN: THE ASSET RESHAPING ALTERNATIVE INVESTMENT STRATEGIES</p> <p>Armchair Chat: Adam Back, PhD Co-Founder, Chief Executive Officer, Blockstream Asset Management</p> <p>Sean Bill Chief Investment Officer, Blockstream Asset Management</p>
2:15-3:15	<p>CAPITAL EFFICIENCY & THE REVITALIZATION OF PORTABLE ALPHA</p> <p>Moderator: Jim Ferguson Director of Institutional Sales, StoneX Group</p> <p>Panelists: Jean-Francois Crousillat, CAIA Managing Director, Lighthouse Group</p> <p>Marc Lorin Chief Investment Officer, New Hyde Park Alternative Funds</p> <p>Jeff Malec, CAIA Managing Director and Partner, RCM Alternatives</p> <p>Timothy Sweeney, CAIA Director, Public Markets, Texas Municipal Retirement System</p>
3:15-3:45	<p>NETWORKING COFFEE AND SNACKS</p>
3:45-4:45	<p>MINING MARKET INEFFICIENCIES: A FUNDAMENTAL AND SYSTEMATIC LENS</p> <p>Moderator: Sladja Carton Institutional Portfolio Manager, Liquid Alternatives, Fidelity Investments</p> <p>Panelists: Keith Friedman Managing Director, Absolute Return Strategies, GCM Grosvenor</p> <p>Seth Gold Portfolio Manager, Convertible Arbitrage, Fidelity Investments</p> <p>John Holton, CAIA Vice President, Alternatives Manager Research, Wilshire</p> <p>Grant Jaffarian Portfolio Manager, Crabel Capital Management</p>
4:45-5:30	<p>NAVIGATING AND NARRATING VOLATILITY: THE INCREASED IMPORTANCE OF ACCURATE HEDGE FUND BENCHMARKS</p> <p>Moderator: Jonathan Caplis Chief Executive Officer, PivotalPath</p> <p>Panelists: Christian Lundblad, PhD Richard "Dick" Levin Distinguished Professor of Finance & Senior Associate Dean for Faculty and Research, Institute for Private Capital, UNC</p> <p>Cullen McNamee, CFA Executive Director, Investments & Director of Risk for Liquid Assets, GCM Grosvenor</p> <p>Brian Payne, CFA, CAIA Chief Strategist, Private Markets & Alternatives, BCA Research</p>
5:30-7:00	<p>CLOSING COCKTAILS & NETWORKING</p>

SPEAKER BIOS



ADAM BACK, PHD

Co-founder, Chief Executive Officer, Blockstream Asset Management

Co-founder and CEO of Blockstream, Dr. Adam Back, invented Hashcash, the proof-of-work algorithm cited by Satoshi Nakamoto in the Bitcoin whitepaper, as the future basis for its mining function. Throughout his two-decade-long vocation as an applied cryptographer and security architect, he has held senior roles with a number of technology companies, including Microsoft, EMC, PI, VMware, and Zero-Knowledge Systems, as well as advised many more companies on cryptography and peer-to-peer finance. Dr. Adam Back holds a computer science Ph.D. in distributed systems from the University of Exeter.



MCKENNA (PHILLIPS) BEGALA, CFA, CAIA

Senior Associate, Teacher Retirement System of Texas

McKenna (Phillips) Begala is a Senior Associate in the Public Markets group at the Teacher Retirement System of Texas, a \$200 billion pension system serving 1.9 million active and retired educators and their families. Mrs. Begala works across hedge fund and long oriented equity/credit strategies, with a focus on multi-strategy platforms, reinsurance, and semi-liquid credit. Prior to joining Texas Teachers, Mrs. Begala was a Senior Associate and Manager at Dimensional Fund Advisors, a \$786 billion quantitative investment firm. Mrs. Begala is a graduate of the University of Texas at Austin McCombs School of Business. She is a CFA Charterholder and holds the CAIA designation.



SEAN BILL

Chief Investment Officer, Blockstream Asset Management

Sean Bill is the Chief Investment Officer at Blockstream, leading the Asset Management Division to develop innovative Bitcoin-based financial solutions. With over 30 years in traditional finance, Sean has held leadership roles such as CIO at Prime Meridian Capital Management, where he oversaw award-winning hedge funds, and as Treasurer and CIO for the Santa Clara Valley Transportation Authority. Named to CIO Magazine's Power 100 list, Sean is a recognized expert in institutional investment and a pioneer in integrating Bitcoin into traditional portfolios. A graduate of Indiana University and Stanford GSB, he frequently appears on Bloomberg and CNBC, shaping the future of finance at the intersection of Bitcoin and institutional finance.



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.

SPEAKER BIOS



SLADJA CARTON

Senior Vice President, 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.



DENIZ CICEK

Portfolio Manager, Axonic Capital

Deniz Cicek joined Axonic in 2017. He is the Lead Portfolio Manager of Axonic Systematic Arbitrage Fund responsible for portfolio management, research, and trading activities. Between 2010 and 2017, he was employed at Barclays Bank PLC where he started in Quantitative Analytics Department as a desk quant. In 2012 he moved internally to one of the propriety trading desks where he traded interest rate derivatives systematically. During his last year at Barclays, he was part of Quantitative Investment Strategies group building and trading systematic strategies and alternative beta indices for institutional clients. He holds a BS in Industrial Engineering with a Minor in Mathematics from Sabanci University in Istanbul and was in the PhD program in Decision, Risk & Operations Department at Columbia Business School.



JORDAN CIPRIANI

Director of East Coast Consulting, Senior Consultant, Principal, RVK, Inc.

Jordan joined RVK in 2012 and is based out of Washington, DC. In addition to her consulting responsibilities, she leads RVK's East Coast consulting operations and serves on the firm's Board of Directors. Jordan has extensive experience advising a diverse mix of clients that includes public funds, endowments and foundations, corporate entities, and insurance funds. She is responsible for a broad range of consulting disciplines, including investment policy, governance, asset allocation, asset class structure, performance evaluation and attribution, investment manager searches, and client education. Prior to joining RVK, Jordan worked at Cambridge Associates as a research analyst. Jordan earned a Bachelor of Business Administration degree with a dual concentration in Finance and International Business from The George Washington University. She is a shareholder of the firm.

SPEAKER BIOS



JEAN-FRANCOIS CROUSILLAT, CAIA

Managing Director, Lighthouse Investment Partners

Jean-Francois Crousillat (JC) is responsible for business development efforts in North/South America and Europe. JC works closely with global pensions, consultants, insurance companies, private banks, family offices, and RIAs in these regions. He joined Lighthouse with over 20 years of industry experience. Previously, JC was a managing director with Franklin Templeton's Alternative Strategies unit where he led the U.S. and South American distribution team's alternative investment products for its subsidiaries, K2 Advisors and Benefit Street Partners. Prior to Franklin Templeton, JC was a founding member of HedgeMark International, now a division of BNY Mellon, with direct responsibility for the early-stage key accounts. In total, JC spent nearly seven years with HedgeMark Advisors serving in several different roles. Before his time at HedgeMark, he was a vice president and led hedge fund relations at Measurisk, a JP Morgan Company that was formerly affiliated with The Bear Stearns Companies. Measurisk focused on measuring and monitoring risk on hedge fund portfolios at the position level for institutional clients. Earlier in his career, JC worked at Citigroup Asset Management (CAM), as a relationship officer and a business analyst. JC received his BA in Economics from SUNY Stony Brook and his MBA in Finance from Fordham University. Additionally, he is a CAIA charterholder.



BRADLEY DAVIS, CFA

Senior Portfolio Manager, Texas Treasury Safekeeping Trust Company

Mr. Davis joined the Trust Company's external investment team in 2020 as a Senior Portfolio Manager responsible for oversight of Alternative Fixed Income strategies. Prior to taking this role, Brad worked as Director of Fixed Income & Capital Markets Research for Asset Consulting Group (ACG), which has served as the Trust Company's general consultant for over a decade. With over 20 years of investment-related experience and given familiarity across Trust Company portfolios, he's also responsible for the day-to-day management of the State Water Implementation Fund for Texas (SWIFT) and the Texas Economic Stabilization Investment Fund (TESTIF) otherwise known as the state's "rainy day fund". Brad holds a Chartered Financial Analyst (CFA) designation and is a current member of the CFA Society of Austin. He holds a Bachelor of Science Degree in Business Administration & Finance from the University of Kansas, where he graduated summa cum laude and was an Academic All-American as a member of the men's golf team.



ZACHARY DRISCOLL, CFA

Managing Principal/Research Consultant, Meketa Investment Group

Mr. Driscoll joined Meketa in 2018. He serves as a research consultant covering marketable alternative strategies in the Public Markets Manager Research group. His primary responsibilities include evaluating, selecting and monitoring investment managers. Areas of focus for his research include, but are not limited to, global macro, trend following, market neutral and insurance linked strategies. Mr. Driscoll also assists clients with portfolio construction and asset allocation. Prior to joining the firm, he worked at State Street Corporation. Mr. Driscoll graduated from the Villanova School of Business at Villanova University, cum laude, with a degree in finance and a minor in business analytics. He holds the Chartered Financial Analyst® designation and is a member of the CFA Institute.



JONATHAN FEENEY

Managing Director, Investcorp-Tages

Mr. Feeney is responsible for investment analysis across Investcorp AIS group's Special Opportunity Portfolios, Hedge fund Partnerships and Multi-manager Solutions offerings. Mr. Feeney joined Investcorp in 2003. Prior to joining Investcorp, Jonathan worked for Cazenove Capital Management in London where he was a member of the Investment Strategy and Investment Process teams. Jonathan has also held positions in management consulting, risk and quantitative analysis and has more than twenty-two years of investment experience. Jonathan holds a MSc. in Economics and Finance from the University of Bristol and the IIMR (UK equivalent of the CFA).

SPEAKER BIOS



JIM FERGUSON

Director, Institutional Sales, StoneX Group

Jim Ferguson is entering his 33rd year in the financial business. Jim started in the industry in 1993 as a Broker's Clerk on the Chicago Board of Trade Grain Floor. It's there where he first became exposed to the world of Managed Futures and Hedge Funds, working before and after market hours for a Commodity Trading Advisor, checking statements and client equity runs. His career experience progressed through roles ranging from execution specialist on the earliest Electronic Futures Platforms to Order Desk Brokerage to Clearing and Execution Sales (Series 3 designation obtained and maintained since 1996) to primarily Futures Trading clients. In 2001, Jim obtained his Series 7 and 63 Licenses and began work in a Money Market Sales Group in the securities subsidiary of a top US Bank. In 2007, he moved from the bank's fixed-income division to their Futures Commission Merchant (FCM) subsidiary, as VP-Institutional Sales, managing relationships with Corporate Energy Firms, Utilities, Hedge Funds and Commodity Trading Advisors. A year later, Jim left that bank to join another bank in a similar role, where he developed and maintained a book of clients - again including Corporate Energy Firms, Utilities, Hedge Funds, Funds of Funds and Commodity Trading Advisors. Since 2011 and at present, Jim is a Director, Institutional Sales, at StoneX Financial, Inc., a combined Broker-Dealer and FCM subsidiary of StoneX Group Inc. (Nasdaq: SNEX). Jim provides clients across the globe with a comprehensive range of customized financial services and tools to help them protect their margins and manage market volatility. A specialized financial services firm, StoneX serves mid-market clients with Research, Execution & Clearing, and Advisory Services. Jim's focus at StoneX has included servicing a mix of clients ranging from energy or agricultural firms seeking price-risk protection, to Commodity Pool Operators and Commodity Trading Advisors who speculate in futures and OTC products on global derivatives exchanges (or bilaterally) worldwide.



JENS FOEHRNBACH, CFA

President & Co-Chief Investment Officer, Graham Capital Management

Jens Foehrenbach, CFA, is the President and Co-Chief Investment Officer of Graham Capital Management, L.P. ("Graham"), an alternative investment manager with approximately \$20B AUM as of May 1, 2025. Mr. Foehrenbach jointly oversees and supervises Graham's discretionary and systematic portfolio manager teams, trading, and research, alongside Pablo Calderini, Vice Chairman and Co-Chief Investment Officer. Mr. Foehrenbach is also a member of the firm's Executive, Investment, and Risk committees. Prior to joining Graham, he worked at Man Group from September 2008 to February 2025, most recently as Head of Public Markets within Discretionary Investments at Man Group. Mr. Foehrenbach has served in several capacities for the Man Group during his tenure at the firm, including Chief Investment Officer of Man Solutions and Chief Investment Officer of Man FRM. Prior to joining Man Group, Mr. Foehrenbach worked at Harcourt Investment Consulting AG as Senior Analyst and Head of Relative Value. Prior to Harcourt Investment Consulting AG, he was employed by UBS AG, where he worked on the bank's fixed income derivatives trading desk in Switzerland and London. Jens Foehrenbach received a Master's degree in Business Economics from the University of Basel, Switzerland in 2001.



KEITH FRIEDMAN

Managing Director, Absolute Return Strategies, GCM Grosvenor

Mr. Friedman is responsible for portfolio strategy for GCM Grosvenor's Belmont Harbor Strategy. He also serves as a Portfolio Manager for a number of multi-strategy portfolios and for other specialized strategies and custom mandates. Mr. Friedman leads activities related to the construction, implementation, and ongoing management of portfolios. Prior to becoming a Portfolio Manager, Mr. Friedman was a member of the Research Team and shared responsibilities for investment research and due diligence across a range of strategies. Prior to joining GCM Grosvenor, Mr. Friedman was the Director of Alternatives Research and Quantitative Analysis at Iron Financial and Iron Partners. At Iron Financial and Iron Partners, Mr. Friedman managed the investment research analyst team that focused on hedge fund manager due diligence. Mr. Friedman received his Bachelor of Arts in Finance from the University of Illinois at Urbana-Champaign and his Master of Business Administration from the University of Chicago Booth School of Business, with concentrations in Finance, Economics, Accounting, and Econometrics & Statistics.

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.



WAYNE HIMELSIEN

President & Chief Investment Officer, Logica Capital Advisers

Mr. Himelsein is responsible for leading portfolio management and the overall implementation of the firm's investment strategies. Mr. Himelsein is a member of the Investment Committee and Risk Committee. Beginning his career in 1995 as a proprietary trader, Mr. Himelsein launched his first hedge fund in 1999. He founded Logica in 2011. Throughout his career, he has continued to develop, evolve, and refine his quantitative trading, risk, and portfolio management processes. Mr. Himelsein and his team initially conducted four years of R&D to solve the problem of pervasive negative skewness inherent in hedge funds, with a quest to produce absolute returns regardless of market regime or stress, which today serves as the basis of the Logica strategies. Mr. Himelsein graduated from the University of California, Berkeley.



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®.



JOHN HYNES

Chief Executive Officer, HedgeFacts

John Hynes, CEO, is a qualified chartered accountant with a career in international finance. John began his career with PricewaterhouseCoopers and subsequently worked at Barclays Bank and Allied Irish Banks plc before joining HedgeFacts. Over the past 15 years John has been instrumental in the expansion of HedgeFacts, maintaining a long-term perspective for this private family held business.

SPEAKER BIOS



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.



GUILLAUME JAMET, PHD

Principal Manager & Co-Chief Investment Officer, Metori Capital Management

Guillaume has been Epsilon's Principal Manager since 2013. He joined SG Group in 2003 and occupied various key positions in the quant domain. He gave frequent lectures on quantitative finance at the Paris ENSAE. Prior to this, Guillaume worked 5 years teaching mathematics at University Paris VI and published his research in top tier international journals. He obtained his PhD in Mathematics and Master in Applied Probability and Finance from University of Paris VI, and holds the title of "Agrégé de Mathématiques".



PATRICK KAZLEY

Solutions Portfolio Manager, One River Asset Management

Patrick Kazley is a Solutions Portfolio Manager at One River Asset Management, leading ORAM's risk mitigation solutions practice. In this role, Patrick helps construct and manage portfolio solutions for clients. Further, Patrick helps global clients understand, access, and stay connected to the investment capabilities of One River. Patrick leverages over a decade of experience in systematic strategies and institutional investing. Before joining One River, Patrick worked at AQR Capital Management, beginning in 2015. At AQR, Patrick was most recently a Vice President in the Portfolio Management and Research division for the Global Stock Selection group. Within this team, Patrick served as a product specialist for both multi-asset and stock-specific strategies, ranging from market-neutral hedge funds to traditional long-only equity products. Before this role, Patrick helped establish and grow AQR's first presence in Asia based out of Hong Kong. Across the Asia region, he helped large institutions access the strategies and capabilities of AQR as they made key allocation decisions. Before this, Patrick carried out a similar role in the U.S. for AQR. Patrick began his career at J.P. Morgan as an Investment Specialist in the Private Bank. Patrick holds a degree in International Finance from Tufts University, graduating magna cum laude. Patrick also holds a certificate in Enhanced Financial Analysis from the Principles for Responsible Investment Academy.



PANAYIOTIS LAMBROPOULOS, CFA, CAIA, FRM

Portfolio Manager, Employees Retirement System of Texas

Panayiotis Lambropoulos is a Portfolio Manager at the Employees Retirement System of Texas – a \$38 billion retirement plan – located in Austin, Texas. His responsibilities include sourcing, analyzing and evaluating potential third party managers deploying all types of alternative investment strategies. His primary focus is on the Trust's Absolute Return Portfolio along with opportunistic investments in Emerging Managers. Panayiotis holds a B.S in Business Administration with a concentration in Finance and Marketing from Boston College, and an M.B.A in General Management from Northwestern University.

SPEAKER BIOS



MARC LORIN

Chief Investment Officer, New Hyde Park Alternative Funds

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.

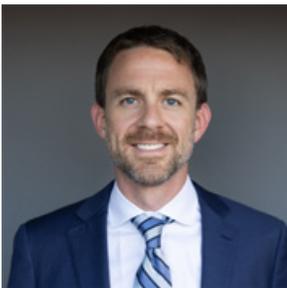


CHRISTIAN LUNDBLAD, PHD

Richard Levin Distinguished Professor of Finance &

Senior Associate Dean of Faculty & Research, Institute for Private Capital, UNC

Christian Lundblad is the Richard Levin Distinguished Professor of Finance and the Senior Associate Dean for Faculty and Research at the University of North Carolina's Kenan-Flagler Business School. He earlier served as the Chair of the Finance Area and the Associate Dean of the Ph.D. Program. He is also a Senior Fellow at the Kenan Institute of Private Enterprise. Finally, he holds a courtesy appointment as a Special-Term Professor at the People's Bank of China School of Finance, Tsinghua University in Beijing, China. His research spans asset pricing, investment management, and international finance, with a specialization in emerging market development. His research has been published in top academic journals such as the Journal of Finance, the Review of Financial Studies, and the Journal of Financial Economics. He served as an Associate Editor for the Journal of Finance, and now serves at the Journal of Banking and Finance and Financial Management. He also served as a financial economist at the Federal Reserve Board in Washington, D.C., where he advised the Board of Governors on international financial market developments. He is the recipient of Weatherspoon Award for Excellence in Research and the MBA for Executives and One MBA Teaching Excellence awards. He received a PhD in financial economics and a master's degree in economics from Duke University. He earned his BA in economics and English literature with highest honors from Washington University in St. Louis.



NICK MAFFEO, CAIA

Director of Hedge Funds, Employees Retirement System of Texas

Nick joined the Employees Retirement System of Texas (ERS) in 2012. As Director of Hedge Funds, his focus is on managing the hedge fund allocations on behalf of the ERS Retirement Trust Fund. His duties include manager sourcing, ongoing due diligence of existing investments, as well as the broader management of the underlying hedge fund portfolios. Before joining ERS, he served as a Senior Research Analyst at Altegris Investments. At Altegris, he focused on the sourcing and monitoring of the firm's hedge fund and managed futures investments. Nick received a Bachelor of Science in Finance from Shippensburg University and a Master's in Business Administration from University of Florida. He holds a Chartered Alternative Investment Analyst (CAIA) designation.



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.

SPEAKER BIOS



CULLEN MCNAMEE, CFA

Executive Director, Investments, and Director of Risk for Liquid Assets, GCM Grosvenor
Mr. McNamee is responsible for risk strategy and oversight of liquid assets. Mr. McNamee manages the risk team responsible for the development and employment of quantitative tools and frameworks for risk monitoring, alpha measurement, and portfolio construction across multi-strategy (and multi-asset class) portfolios and specialized liquid mandates. He received his Bachelor of Business Administration cum laude in Finance and Applied Mathematics from the University of Notre Dame and his Master of Science in Applied Data Science from the University of Chicago. He holds the Chartered Financial Analyst® designation.



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.



BRIAN PAYNE, CFA, CAIA

Chief Strategist, Private Markets & Alternatives, BCA Research

Brian Payne is BCA Research's Chief Strategist of Private Markets & Alternatives (PMA). He provides independent forward-looking views and quantitative expectations across the spectrum of private markets and alternatives, including private equity, private credit, hedge funds, infrastructure, and real estate. Prior to BCA Research, Brian was an Investment Officer of the Teachers' Retirement System of Illinois where he restructured and oversaw a \$5bn+ multi-asset portfolio consisting of hedge funds, private investments, and opportunistic strategies. Prior to Illinois, he was a buy-side researcher and trader at Potomac River Capital. Brian started his career in wealth management with Fortigent, an RIA consulting firm, where he researched and advised on alternative investments and asset allocation.



MATTHEW PISELLI, PHD

Chief Investment Officer, Terreplein Investment Management

Matthew Piselli is CIO of Terreplein Investment Management, a systematic commodity trading hedge fund. Prior to the launch of Terreplein, Mr. Piselli was Principal and Portfolio Manager at FORT LP where he developed and managed commodity-based strategies for the firm. Before joining FORT, Mr. Piselli ran a quantitative discretionary commodity hedge fund, Buttonwood Merchants LLC, from 2015-2018. His fund was initially launched on Tudor's incubation platform, Launchpad Trading, before transitioning to a standalone entity in 2017. Prior to this, he was with Gresham Investment Management as Head Trader from 2010-2015. At Gresham, he oversaw all discretionary alpha generation for their flagship TSM Strategy, which peaked at \$7.8 billion AUM. Mr. Piselli began his career at UBS in the Energy Trading Group in 2006, where he worked on structured deals before going on to manage all of UBS's physical US Natural Gas assets. Mr. Piselli graduated with a BSE from Princeton University in Operations Research and Financial Engineering. He has a PhD in Applied Mathematics from Yale University.

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.



TIMOTHY SWEENEY, CAIA

Managing Director, Public Markets, Texas Municipal Retirement System

Timothy Sweeney is the Director of Public Markets for Texas Municipal Retirement System (TMRS) where he manages the Hedge Fund Portfolio and Global Public Equity Portfolio. He joined TMRS in September of 2020 on their Absolute Return Team in Austin, TX. Prior to TMRS, he headed both European Equity and Global Macro Trading at Balyasny Asset Management in London. He joined Balyasny in 2009 and also held cross-asset trading roles in Chicago and New York. Timothy began his career at Lehman Brothers in 2004 where he worked in emerging market fixed income sales. He graduated with a Bachelors in Finance from the University of Connecticut and holds the CAIA designation.

SPEAKER BIOS



PETER VAN DOOIJEWERT

Head of Strategic Investment Partnerships, Capstone Investment Advisors

Peter van Dooijeweert joined Capstone in December 2024 as Head of Strategic Investment Partnerships. Prior to Capstone, Peter spent six years at Man Group where he was Head of Defensive and Tactical Alpha working closely with Man's largest clients to design customized actively managed investment portfolios and strategies. Prior to Man, Peter spent over 15 years as a volatility arbitrage portfolio manager at Paloma Investments Partners, Soros Fund Management and Tudor Investment Corporation. Peter has served on investment and portfolio risk committees at Man and Paloma bringing over 25 years of experience in derivatives and alternatives to capital allocation and firm wide portfolio management decisions. He began his career with Goldman Sachs in Equity Derivatives Trading in Tokyo and New York. Peter holds a Bachelor of Science (B.S.) in Accounting and Finance from Wake Forest University where he graduated Summa Cum Laude.



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 holds 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.



MARKIAN ZYGA, CFA

Chief Investment Officer, Mission Crest Capital Management

Markian is the chief investment officer of the Mission Crest strategy. Markian is responsible for the day-to-day portfolio management at Mission Crest Capital, which includes overseeing portfolio construction, capital allocations, and risk management. Markian launched the strategy while serving as a managing director at Lighthouse, where he was the chairman of the firm's quantitative and macro committee. Previously, Markian attended Loyola University Chicago, where he graduated magna cum laude with a BBA in Finance and Economics. While at Loyola, he was also named an Academic All-American as a member of the men's soccer team. Markian is also a CFA charterholder.

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