



TALKING HEDGE



# NASHVILLE 2025

HEDGE FUND OPPORTUNITIES TAKE CENTER STAGE

PLUS

EVOLVING MANAGERS & INVESTORS EXCHANGE

OCTOBER 21 & 22, 2025 | NOELLE NASHVILLE

# CONFERENCE GUIDE

# CONFERENCE SPONSORS





Welcome to Talking Hedge Nashville 2025! We're thrilled to gather such an outstanding mix of industry luminaries to opine on the current geopolitical and market chaos and, importantly, to expound on the proliferation of innovative hedge fund solutions designed to optimize outcomes for investors. This year our conference theme is *Hedge Fund Opportunities Take Center Stage*.

The winds of change are shifting the needs of sophisticated investors around the world. Today, the role of diversification is more prominent than ever before, and hedge fund opportunities have taken center stage. An abundance of innovative strategies and structures that are the signature of the hedge fund industry offer allocators the customization benefits they need to meet their fiduciary responsibilities.

Get ready for a breadth of substantive discussions as we examine how access to hedge funds has evolved to answer the growing needs of investors.

We're also delighted to present our pre-conference luncheon and program, the *Evolving Managers & Investors Exchange*, curated for investors seeking access to evolving strategies and fresh ideas.

Talking Hedge is privileged to partner with prominent hedge funds and solutions providers to create a robust agenda that zeros in on next gen strategies and techniques customized to empower asset owners while maintaining diligent risk mitigation processes. Our agenda also allows ample time to network.

Please join us in thanking the following esteemed organizations that partnered with us to develop such a timely and informative program for you:

**Deutsche Bank, Lighthouse Group, Lombard-Odier Asset Management, Man Group, New Hyde Park Alternative Funds, RCM Alternatives, StoneX Group, Wilshire, Zweig-Dimenna Associates, Asset Management One USA, Golden Eagle Strategies, HedgeFacts, Metori Capital Management, O'Brien Investment Group, Old Farm Partners, Oraclum Capital, PivotalPath, ReSolve Asset Management, UBS, Versor Investments, Welton Investment Partners, and Winton.**

We have a fabulous group of speakers ready to engage you, excite you, challenge you, and inspire you! We are grateful for their time and enthusiasm to share their expertise and their imaginations.

We hope you enjoy the program and the networking designed to help you build new and stronger relationships as this incredible industry continues to evolve.

Enjoy your time together!

  
Meg Bode  
Founder

# CONFERENCE PROGRAM

## TUESDAY, OCTOBER 21

12:00-4:00 **EVOLVING MANAGERS & INVESTORS EXCHANGE, LUNCHEON & PROGRAM**

Luncheon, in the Lona Restaurant, followed by:

Manager Presentations:

**LH PAMLI Partners**

Faisal Syed, Chief Executive Officer & Chief Investment Officer

**Lombard Odier Asset Management (USA) Corp. | 1798 Physical Uranium**

John Segrich, Portfolio Manager, in a Barstool Chat with Kieran Cavanna, Chief Investment Officer, Old Farm Partners

**Oraclum Capital**

Scott Alford, General Partner, Chief Operating Officer

**Versor Investments**

DeWayne Louis, Founding Partner

**Zweig-DiMenna Associates**

Michael Schaus, Chief Investment Officer, and Matthew Finkelstein, Portfolio Manager

What Allocators Look for in Evolving Managers:

**Moderator: Joseph Mooney**  
Executive Director, UBS

**Allocators: Jonathan Daffron**  
Head of External Alpha Managed Accounts, Man Group

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

**Tom Holliday**  
Founder, Chief Investment Officer, HIP Investments

**Jeff Malec, CAIA**  
Managing Director and Partner, RCM Alternatives

**Jackie Rosner**  
Managing Director, PAAMCO/Prisma

5:00-7:00 Welcome Reception, All delegates - Rare Bird Rooftop Bar

## WEDNESDAY, OCTOBER 22

7:00-8:00 **NETWORKING BREAKFAST**

8:00-8:15 **WELCOME REMARKS**

8:15-9:15 **REIMAGINING ALPHA SOURCES: HOW NEXT GEN STRATEGIES AND TECHNIQUES ARE EMPOWERING ASSET OWNERS TO ACHIEVE BETTER PORTFOLIO OUTCOMES**

**Moderator: Andrew Dabinett**  
Managing Director, Co-Head of Alternative Managed Accounts, Wilshire

**Panelists: Kieran Cavanna**  
Chief Investment Officer, Old Farm Partners

**Puneet Kohli, CFA**  
Senior Investment Director, Global Pension Fund

**William Park**  
Chief Investment Officer, Altisma Capital Management

9:15-10:15 **IS IT ALWAYS BETTER TO INCREASE YOUR INVESTMENT UNIVERSE?**

**Moderator: Jackie Rosner**  
Managing Director, PAAMCO Prisma

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

**Michael Schaus**  
Chief Investment Officer, Zweig-DiMenna Associates

**Michael Stendler**  
Managing Director, O'Brien Investment Partners

- 10:15-10:45 **NETWORKING COFFEE AND SNACKS**
- 10:45-11:30 **FRESH APPROACHES TO REPEATABLE ALPHA OPPORTUNITIES IN EQUITIES**
- Moderator: Thomas Ducrot  
Chief Executive Officer & Chief Investment Officer, Fides + Ratio
- Panelists: Marc Lorin  
Chief Investment Officer, New Hyde Park Alternative Funds
- Adam McConkey, PhD  
Head of Team & Co-Lead Portfolio Manager, Lombard-Odier Asset Management
- Marc Zuccaro  
Managing Principal, Portfolio Manager, Golden Eagle Strategies
- 11:30-12:15 **ALPHA AND BETA FOR EVERY PORTFOLIO: THE NEW LIQUID ALTS WAVE**
- Moderator: Jeff Malec, CAIA  
Managing Director and Partner, RCM Alternatives
- Panelists: William Marr  
Senior Managing Director, Head of Business Development, Welton Investment Partners
- Mike Philbrick, CIM, AIF  
Chief Executive Officer, ReSolve Asset Management
- Brian Stutland  
Chief Investment Officer, Equity Armor Investments
- 12:15-1:30 **NETWORKING LUNCHEON**
- 1:30-2:15 **MENDING THE MACRO AND MANAGED FUTURES MISNOMER: HOW BAD DATA DAMAGES AND GOOD DATA ENHANCES THE RELEVANCE OF TWO KEY HEDGE FUND STRATEGIES**
- Moderator: Jonathan Caplis  
Chief Executive Officer, PivotalPath
- Panelists: Jonathan Daffron  
Head of External Alpha Managed Accounts, Man Group
- Edward den Dooven  
Business Development, Winton
- John Fidler  
Chief Investment Officer, Wealth Management & Trust, Stock Yards Bank & Trust
- 2:15-3:00 **NEW RISK MITIGATION STRATEGIES & CREDIT/FIXED INCOME TAIL RISK**
- Moderator: Christopher Mandas, CFA, CAIA  
Director, Hedge Funds, Cliffwater
- Panelists: Tom Holliday  
Founder & Chief Investment Officer, HIP Investments
- Herman Laret  
Principal, Laret Capital Partners
- Faisal Syed  
Chief Executive Officer & Chief Investment Officer, LH PAMLI Partners
- 3:00-3:30 **NETWORKING COFFEE AND SNACKS**
- 3:30-4:15 **RETHINKING HEDGE FUND ALLOCATIONS: PORTABLE ALPHA IN FOCUS**
- Moderator: John Hynes  
Chief Executive Officer, HedgeFacts
- Panelists: Luke Hinshelwood  
Managing Director, Middlemark Partners
- Roxton McNeal  
Former Managing Director and Head of Strategy and Allocation at UPS, Roxton Investment Consulting
- Georgios Perdikommatis  
Director, Head of dbSelect & dbMA+ Structuring, DB Investment Solutions, Deutsche Bank
- 4:15-5:00 **KEYNOTE BARSTOOL CHAT:  
FROM CENTRAL BANKS TO MAIN STREET: A CONVERSATION ON MACROECONOMIC TRENDS**
- Dr. Mark Shore  
Director and Economist, CME Group
- Moderated by: John Kutner  
Director, Institutional Sales, StoneX Group
- 5:00-7:00 **CLOSING COCKTAILS & NETWORKING - Trade Room**
- 7:00 **CLOSING DINNER HOSTED BY HEDGEFACTS, ADM INVESTOR SERVICES, AND ASSET MANAGEMENT ONE  
ALL DELEGATES WELCOME, PEG LEG PORKER**

# SPEAKER BIOS



## **SCOTT ALFORD**

*General Partner, Chief Operating Officer, Oraclum Capital*

Scott Alford is a General Partner and Chief Operating Officer (COO) of Oraclum Capital LLC. In his role he is responsible for driving business development, identifying strategic partners, marketing efforts, and ensuring regulatory compliance. Prior to joining Oraclum Capital, Scott was a fundraising and philanthropy consultant at Azariah Advising LLC, where he advised family foundations and non-profits on philanthropic investments and fundraising strategies. His previous experience includes positions at the Cato Institute in Washington D.C., the Charles Koch Foundation, and Veritas Collegiate Academy. Scott is involved in philanthropic work as well, serving on the boards of Abraham House Global and Healing Africa. He holds a Master of Arts from George Mason University and a Bachelor of Arts in Economics and History from Grove City.



## **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.



## **KIERAN CAVANNA**

*Co-founder and Chief Investment Officer, Old Farm Partners*

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



## **ANDREW DABINETT**

*Managing Director, Co-Head of Alternative Managed Accounts, Wilshire*

Andrew is a Managing Director and Co-Head of Alternative Managed Accounts at Wilshire. He joined the firm in December 2023 as part of the Lyxor U.S. acquisition. Andrew is a member of the firm's global leadership team. Prior to joining Wilshire, Andrew was CEO of Lyxor U.S. Prior to his CEO role, he led the business development team since joining the firm in 2016. Andrew began his career in 1986 working in the Chicago futures market. He worked for various investment banks in the United Kingdom and the United States in derivative sales, program-trading and prime brokerage – covering hedge funds, index fund managers and asset owners. He moved into investment management in 2006, joining a multi-strategy hedge fund in a business development role. Andrew earned his bachelor's degree in business finance from the City of London Polytechnic.

# SPEAKER BIOS



## **JONATHAN DAFFRON**

*Head of External Alpha Managed Accounts, Man Group*

Jonathan Daffron is Head of External Alpha Managed Accounts, responsible for the management and oversight of managed account solutions. Jonathan is also a member of the Solutions' External Alpha Investment and Risk Committees and the Man Group 401K Investment Committee, whilst also volunteering his time as a Director of the Man US Charitable Foundation. Jonathan was previously Deputy Head of Investment Risk, Man FRM. Prior to joining Man Group in 2020, Jonathan was a risk manager at Goldman Sachs for 17 years, where he was most recently the Global Head of Market Risk for the Investment Management Division. Jonathan holds a bachelor's degree from Johns Hopkins University, where he majored in International Studies and German.



## **EDWARD DEN DOOVAN**

*Business Development, Winton*

Edward is responsible for business development in the United States for Winton. Edward joined Winton in early 2022, with a focus on growing the firm's presence in North America. Previously, Edward worked with Lynx Asset Management, where he was responsible for business development in North and South America. Edward holds a degree in Political Science from Florida Atlantic University.



## **THOMAS DUCROT**

*Chief Executive Officer & Chief Investment Officer, Fides + Ratio*

Thomas is the Founder, Chief Executive Officer, and Chief Investment Officer of Fides + Ratio LLC and Ratio Indices LLC. Thomas served as an Executive Director in Capital Introductions for Morgan Stanley from 2010 to 2016 where he concentrated on listed derivatives (macro/commodities) and systematic strategies (equities and futures). Prior to his tenure at Morgan Stanley, Thomas worked for Newedge (now Société Générale). Before joining Newedge, he was Head of Research and Portfolio Management for Cedar Partners, a fund of funds with over \$1 billion of invested assets across all hedge fund asset classes. His work on the portfolio at Cedar Partners led to the sale of its fund of funds business to a leading European bank in 2007. Earlier in his career, Thomas worked in venture capital. Thomas has a B.S. in Management from Dauphine University in Paris as well as an M.S. in Finance from ESCP School of Management in Paris. He is a US/French binational. Tom also speaks French, Spanish and conversational Portuguese.



## **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, 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 subsequently held positions in trading and research at North End Options Strategies and Fox-Pitt, Kelton 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.

# SPEAKER BIOS



## **MATTHEW FINKELSTEIN**

*Portfolio Manager, Zweig-DiMenna 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.



## **LUKE HINSELWOOD**

*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.



## **TOM HOLLIDAY**

*Founder and Chief Investment Officer, HIP Investments*

Tom Holliday is a 37-year veteran in alternative investments. Mr. Holliday began his career in the commodity markets in the late 1980's. Throughout the early 1990's he became proficient and experienced in CTA and hedge fund strategies before eventually moving to New York to join Soros Fund Management in 2000. He left Soros to be co-founder of Titan Advisors where he was CIO and led the investment team and portfolio construction process. At Titan, the team invested globally in over 300 hedge funds across all strategies and invested in over 150 emerging hedge fund managers. After 18 years at Titan, Mr. Holliday left to start HIP Investments to focus on niche investments in the commodity space and has launched the HIP Commodity Desk, a liquid multi-market, multi-strategy commodity focused hedge fund.



## **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



## **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 Masters in Applied Probability and Finance from University of Paris VI, and holds the title of "Agrégé de Mathématiques".



## **PUNEET KOHLI, CFA**

*Senior Investment Director, Global Pension Fund*

Puneet Kohli is an independent investment executive with nearly 30 years of experience trading, investing, and leading portfolio teams across banks and pension plans. Puneet served as Head of the External Managers Group (XMG) at the Ontario Teachers' Pension Plan. In this role, he led the growth and consolidation of the External Manager Platform to support both Capital Markets and Total Fund objectives. XMG invests in Insurance-Linked Funds, Global Equity Funds, and Hedge Funds, managing more than 30 core partnerships and totaling about \$25 billion in assets under management. XMG invests globally in strategic partners with differentiated capabilities across asset classes, geographies, and investment styles, with a focus on building long-term, mutually beneficial relationships. Puneet led a team of 14 investment professionals in Toronto and London. Prior to Ontario Teachers', Puneet was an Assistant Vice President at the Healthcare of Ontario Pension Plan (HOOPP) from 2013 to 2023. He was responsible for direct risk-taking and led investment programs in Capital Markets, Fixed Income, and Derivatives, optimizing returns while managing risk. His responsibilities also included overseeing Derivatives and Alternative Strategies, including External Managers, Insurance-Linked Securities, and Quantitative Trading. He led a team of 10 investment professionals. Before HOOPP, Puneet was a Portfolio Manager at the National Bank of Canada, Alternative Investments, where he managed the Lotus Fund (volatility arbitrage) and the Red Stone Fund (tail risk) for eight years. From 2001 to 2004, Puneet was Vice President, Global Equity Derivatives at BMO Nesbitt Burns (Bank of Montreal). He was responsible for volatility proprietary trading and provided expertise in volatility and credit-based products. Earlier in his career, Puneet held roles at the Ontario Teachers' Pension Plan from 1997 to 2001 in Research and Economics, Quantitative Analysis, and Volatility Portfolio Management. During this time, he managed four market-neutral accounts focused on volatility- and correlation-based strategies. Puneet holds a Bachelor's degree in Mathematics from the University of Toronto, an MBA from the Schulich School of Business, and is a Chartered Financial Analyst (CFA) charterholder.



## **JOHN KUTNER**

*Director of Institutional Sales, StoneX Group*

John Kutner is Director of Institutional Sales at StoneX, where he partners with hedge funds, asset managers, family offices, and proprietary trading firms to deliver multi-asset clearing and execution solutions. His expertise spans futures, options, FICC, and digital assets, with a focus on optimizing capital efficiency and streamlining trade workflows. John also leads cross-selling efforts in prime brokerage, OTC derivatives, and treasury services. With over 17 years in global markets, John has held senior roles at various large financial institutions, advising clients on regulatory-driven clearing mandates and execution strategies. A CPA with Series 7, 3, and 63 licenses, as well as an NFA Swap Dealer AP, he holds an MS/BS in Accounting from St. John's University. John brings a pragmatic, client-first perspective to every conversation.

# 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.



## **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.



## **DEWAYNE LOUIS**

*Founding Partner, Versor Investments*

DeWayne Louis joined Versor Investments as a Founding Partner and is based in New York. DeWayne has over 20 years of experience in quantitative investment strategies, investment banking, private equity and hedge funds. Prior to Versor Investments, DeWayne joined Investcorp's Hedge Fund Group at the inception of the North America and Europe branches. He remained there for nearly a decade. Prior to Investcorp, DeWayne was an Associate Director in UBS' Private Equity Secondary Group, focusing on buying and selling private equity interests in the secondary market. Earlier in his career, DeWayne was an Associate in the Investment Banking Division of Credit Suisse where he focused on mergers, acquisitions and project finance transactions. DeWayne serves on the board of the New York City Economic Development Corporation ("NYCEDC"). NYCEDC is the City's primary vehicle for promoting economic growth in each of the five boroughs. DeWayne also serves on the Board of the Brooklyn Public Library ("BPL"), one of the nation's largest public library systems. BPL is a recognized leader in cultural offerings, literacy, out-of-school-time services, workforce development programs, and digital literacy. DeWayne holds a BS in Finance and International Business with a French minor from Georgetown University. There, he was a four-year varsity letterman on the football team.

# SPEAKER BIOS



## **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.



## **CHRISTOPHER MANDAS, CFA, CAIA**

*Director, Hedge Funds, Cliffwater*

Chris Mandas is a Director of Hedge Fund Research at Cliffwater, an institutional investment advisor and asset manager. His responsibilities include sourcing, underwriting, and monitoring investment managers across the hedge fund industry with an emphasis on equity-oriented strategies. Previously, Mr. Mandas was a Vice President, Senior Investment Associate at Fiduciary Trust International, a private wealth subsidiary of Franklin Templeton Investments, where he advised individuals and institutions on asset allocation, portfolio construction, and manager selection. Mr. Mandas began his career as an analyst at State Street Corporation. He earned a BS in Economics and Business Administration from Sacred Heart University and holds both the Chartered Financial Analyst® and the Chartered Alternative Investment Analyst® designations.



## **WILLIAM MARR**

*Senior Managing Director, Head Business Development, 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.



## **ADAM MCCONKEY, PHD**

*Head of Team & Co-Lead Portfolio Manager, Lombard-Odier Asset Management*

Adam joined the Volantis team at Gartmore in 2002 to specialize in smaller companies. He has been head of the team since 2010 and is the co-lead Portfolio Manager of the 1798 Volantis Fund and the 1798 UK Small Cap Best Ideas Fund. Prior to a career in UK smaller companies he worked on European equity desks at both Gartmore and the Co-Op bank. Adam has a PhD in International Relations and sits on the Board of the Quoted Companies Alliance and the AIM Advisory Group. Adam recently completed his tenure as Chair of the Quoted Companies Alliance, an important role representing the smaller company ecosystem at a time of significant political, social, economic and technological change.

# SPEAKER BIOS



## **ROXTON MCNEAL**

*Former Managing Director & Head of Strategy and Allocation at UPS, Roxton Investment Consulting*  
Roxton McNeal is a distinguished investment professional with extensive expertise in quantitative investment strategies, portfolio management, and pension plan oversight. Previously, as Head Portfolio Manager at QIS Investments with Simplify Asset Management, Roxton leveraged advanced quantitative techniques to drive portfolio construction and manage exchange-traded funds (ETFs), delivering innovative investment solutions. Before Simplify, Roxton served as Managing Director and Head of Investment Strategy & Allocation at the UPS Pension Group, where he oversaw strategic and tactical asset allocation for approximately \$55 billion in defined benefit plan assets. As a key member of the Investment Committee, he spearheaded derivative overlay strategies, asset/liability management (ALM), and robust risk and performance monitoring, ensuring strict adherence to investment policies and optimizing portfolio outcomes. Prior to UPS, Roxton held senior roles at General Motors Asset Management (GMAM), managing \$20 billion in long-duration fixed income assets. He was critical in executing a landmark \$25 billion pension risk transfer agreement and developed sophisticated quantitative analytics to enhance asset class and pension plan performance under GMAM's purview. Earlier in his career, Roxton honed his expertise on the buy side as a trader and portfolio manager for hedge funds, commodity trading advisors (CTAs), and private energy firms. He thrived in fast-paced, high-stakes investment environments, and his ability to navigate complex markets and implement dynamic strategies has been a hallmark of his career. Roxton earned a Bachelor of Science in Economics with a concentration in Finance from the Wharton School at the University of Pennsylvania. He holds prestigious designations, including Chartered Financial Analyst (CFA), Financial Risk Manager (FRM), Chartered Alternative Investment Analyst (CAIA), and a Certificate in Investment Performance Measurement (CIPM). A recognized leader in the investment community, Roxton was named to Chief Investment Officer Magazine's NexGen Class of 2019, honored as Institutional Investor's "Next Chief Investment Officer," and voted among the World's 20 Leading Institutional Investors in Systematic and Volatility Investing by EQDerivatives, Inc. in 2021 and 2023. As a sought-after thought leader, Roxton frequently speaks at global institutional investor conferences and has participated in podcasts such as Flirting with Models and Alpha Exchange, sharing insights on quantitative investing, portfolio construction, and volatility.



## **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.



## **WILLIAM PARK**

*Chief Investment Officer, Altisma Capital Management*

Bill Park is the Founder and Chief Investment Officer of Altisma Capital Management, an investment manager dedicated to multi-strategy alpha extension. Bill's vision for Altisma's innovative solution stems from his 30+ years of experience as an entrepreneur, trader, portfolio manager, allocator, and risk manager. Prior to founding Altisma in 2024, Bill was the inaugural Head of Equity Risk at ExodusPoint, which he joined in 2019 to build a global team to risk manage ExodusPoint's equity and systematic strategies. Bill designed many of ExodusPoint's equity risk capabilities and worked closely with Equity Management on investments. Previously, Bill was Managing Director and Head of Quantitative Strategies and Risk at UBS Hedge Fund Solutions. Bill was a member of HFS senior management committees while leading a global risk team to develop internal quantitative capabilities. Bill also led HFS quantitative investments and launched the liquid alternatives business. In 2003, Bill founded Aviator Fund Management as the Managing Partner and Chief Investment Officer, where he managed \$500M AUM in global and Asia-focused multi-strategy hedge funds. Prior to that, Bill was a Portfolio Manager for HBK's Asian Equities business unit and the founding Managing Director of HBK Japan, where he assembled and managed a pan-Asian multi-strategy team. Bill started his career in 1993 at O'Connor & Associates, where he was a Senior Trader in U.S. Equity Options after earning his S.B. from the department of Mechanical Engineering at Massachusetts Institute of Technology (M.I.T.).

# SPEAKER BIOS



## **GEORGIOS PERDIKOMMATIS**

*Director, Head of dbSelect & dbMA+ Structuring DB Investment Solutions, Deutsche Bank*  
Georgios Perdikommatis heads up the dbSelect and dbMarketAccess+ Structuring team in London, responsible for the origination and structuring of investment solutions using DB's managed account platform capabilities. In his current role, he leads cross-regional initiatives for the delivery of bespoke investment solutions to Deutsche Bank's global client network. Prior to that and since joining Deutsche Bank in 2005, Georgios has held a number of positions with DB's Asset Management and Investment Bank divisions, specialising in derivatives, multi-asset solutions and customised investments linked to funds and alternatives. Georgios holds a MSc in Communications & Signal Processing from Imperial College London and a Diploma in Electrical & Computer Engineering from the National Technical University of Athens.



## **MIKE PHILBROOK, CIM, AIF**

*Chief Executive Officer, ReSolve Asset Management*

He has over 30 years of experience in investment management and is a Chartered Investment Manager (CIM) and Accredited Investment Fiduciary (AIF). He is responsible for investment decisions, coaching, and strategic leadership, and has co-authored the book *Adaptive Asset Allocation: Dynamic Global Portfolios to Profit in Good Times – and Bad* (Wiley), as well several whitepapers and research focused on adding new insights to the quantitative global asset allocation space.



## **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 Privée 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.

# SPEAKER BIOS



## **JOHN SEGRICH**

*Portfolio Manager, Lombard Odier Asset Management*

John has spent the last 30 years investing in technology stocks as well as across the broader energy transition landscape, with a particular focus on renewables, industrials and emerging technologies and industries. His approach brings together a deep understanding of business models as well as the surrounding value chain for stock selection. The team has developed a proprietary risk management framework which takes a quantitative approach to stock sizing and portfolio construction, which helps to dampen the volatility in these underlying sectors. His team has worked with each other for the past eight years, and each of them is an expert in their own right.



## **MARK SHORE**

*Director and Economist, CME Group*

Dr. Mark Shore, Director, and Economist at the CME Group. He is responsible for generating economic analysis on global financial markets by identifying emerging trends, evaluating economic factors, and forecasting their potential impact on CME Group's various asset classes. He is a well-known alternative investment expert with over 30 years of experience in capital markets. He is also an adjunct professor at DePaul University. Previous positions include full-time finance faculty and executive director of the Arditti Center for Risk Management at DePaul University, director of Coquest Institute at Coquest Advisors, head of risk at Octane Research, and chief operating officer of VK Capital, a wholly owned Morgan Stanley commodity trading advisor (CTA) business unit. He conducts educational workshops, webinars, and is frequently invited to speak at industry and academic conferences. Mark has contributed research to several global organizations on volatility, macroeconomics, commodities, asset allocation, due diligence, and alternative investments. Mark received his Doctorate in Business Administration (DBA) from DePaul University with his dissertation topic related to alternative investments. He received his MBA from the University of Chicago.



## **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.



## **BRIAN STUTLAND**

*Chief Investment Officer, Equity Armor Investments*

Mr. Stutland's wide range of experience, which includes making investments ranging from blue chips to distressed companies and even to Exchange seats, along with his record of trading large options positions in turbulent markets, has made him an experienced trader on and off the trading floors of the CBOE. Mr. Stutland is a frequent contributor of market commentary to the news media such as CNBC's Futures Now, Options Action, and Fast Money, while also providing content through social media with market updates given by him and his employees.

# SPEAKER BIOS



## **FAISAL SYED**

*Chief Executive Officer & Chief Investment Officer, LH PAMLI Partners*

Faisal is the CEO and CIO of LH PAMLI Partners, a firm focused on convex, uncorrelated investment strategies across liquid global credit markets. In this role, Faisal is primarily responsible for the day-to-day management of the investment strategies and mandates of LH PAMLI. Previously, Faisal was the Head of the PAMLI Global Credit Strategies Group at Fir Tree Partners. Before Fir Tree, he was the Head of the PAMLI Credit Strategies Group at Ionic Capital Management. Prior to that, Faisal founded PAMLI Capital Management and served as its CIO. Before PAMLI, Faisal was a Managing Director and Portfolio Manager at Highbridge Capital Management, where he initially launched the credit convexity strategy. Earlier in his career, Faisal held roles at J.P. Morgan and Credit Suisse. Faisal earned a Master of Business Administration from Northeastern University and a Bachelor of Commerce from the University of Mumbai in India.



## **MARC ZUCCARO**

*Managing Principal & Portfolio Manager, Golden Eagle Strategies*

Marc Zuccaro, Managing Principal, co-founded the firm with CIO Robert Zuccaro. Marc is the portfolio manager for the Golden Eagle Growth Strategy which takes a concentrated approach to investing in high growth and innovation-driven equities. He also heads up the firm's trading. Marc built Golden Eagle's systematic stock screening process which scours the entire universe of U.S.-listed stocks (including ADRs) each day to identify and track the fastest growing companies in the world. He also oversees the management of our extensive stock history database which includes millions of data points on stock performance across key factors that guide our robust stock selection process. Prior to joining Golden Eagle, Marc built financial products and scaled institutional businesses for major investment banks around the globe. He served as Managing Director at RBC Capital Markets in London, where he led the EMEA electronic trading unit during the bank's post-recession European expansion. Marc also held senior product and management roles in the equities business of Lehman Brothers in London, Tokyo and New York. He began his career with PaineWebber/UBS after graduating from Bates College with a B.S. in Economics and Political Science.

# CONFERENCE ATTENDEES

FINAL

Scott Alford  
General Partner &  
Chief Operating Officer  
Oraclum Capital  
New York, NY USA

Brian Appleton  
Director, Marketing  
Kettle Hill Capital Management  
New York, NY USA

John Black  
Head of Index Options  
Nasdaq  
New York, NY USA

Meg Bode  
Founder  
Talking Hedge Inc  
Glen Cove, NY USA

Matthew Bradbard  
Director & China Consultant  
RCM Alternatives  
Chicago, IL USA

Derrick Brown  
Vice President | DB Investment  
Solutions in the Americas  
Institutional Client Group  
Deutsche Bank  
New York, NY USA

Carlos Cabrera  
Founder  
JOIA Investments  
New York, NY USA

Jonathan Caplis  
Chief Executive Officer  
PivotalPath  
New York, NY USA

Chris Carroll  
Managing Director  
Fulcrum Asset Management  
New York, NY USA

Kieran Cavanna  
Chief Investment Officer  
Old Farm Partners  
Darien, CT USA

Craig Cohen  
Head of Americas Sales  
SGX Group  
Chicago, IL USA

Sean Coviello  
Managing Director  
BWP Capital  
Bohemia, NY USA

Oliver Curtius  
Institutional Prime Services  
ADM Investor Services, Inc  
New York, NY USA

Andrew Dabinett  
Managing Director  
Wilshire Advisors  
New York, NY USA

Jonathan Daffron  
Head of External Alpha  
Managed Accounts  
Man Group  
New York, NY USA

Edward den Dooven  
Business Development  
Winton  
New York, NY USA

Anthony DiPerte  
Director of Institutional Sales  
StoneX  
Chicago, IL USA

Ryan Donovan  
Managing Director,  
Sales and Marketing  
Man Group  
New York, NY USA

Tom Ducrot  
Chief Investment Officer  
Fides + Ratio  
New Rochelle, NY USA

Eric Eiers  
Institutional Prime Services  
ADM Investor Services, Inc  
Chicago, IL USA

John Fidler  
Chief Investment Officer  
Wealth Management & Trust,  
Stock Yards Bank & Trust  
Louisville, KY USA

# CONFERENCE ATTENDEES

FINAL

Matthew Finkelstein  
Portfolio Manager  
Zweig-DiMenna Associates, Inc.  
New York, NY USA

Greg Firtik  
Marketing Director  
Nesvick Trading Group LLC  
Nashville, TN USA

Sam Fox  
Vice President of Investor Relations  
Ionic Capital Management  
New York, NY USA

Scott Glickman  
Senior Vice President  
Wilshire  
New York, NY USA

Grace Harman  
Associate  
Societe Generale  
New York, NY USA

Luke Hinshelwood  
Managing Director  
Middlemark Partners LLC  
Greenwich, CT USA

Thomas Holliday  
Chief Investment Officer  
HIP Investments  
Houston, TX USA

Justin Holman  
Managing Partner  
L'Enfant Capital Partners  
Arlington, VA USA

John Hynes  
Chief Executive Officer  
HedgeFacts  
Dublin, Ireland

Guillaume Jamet  
Principal Manager and  
Co-Chief Investment Officer  
Metori Capital Management  
Paris, France

Jace Jarboe  
Director of Institutional Sales  
StoneX  
Chicago, IL USA

Shaun Jordan  
Director of Business Development  
Quantitative Investment  
Management  
Charlottesville, VA USA

Rafael Juan  
Director of Trading Operations  
Drury Capital  
Princeton, NJ USA

Craig Kaplan  
Senior Manager  
Lombard Odier Asset Management  
(USA) Corp  
New York, NY USA

Puneet Kohli  
Senior Investment Director  
Global Pension Fund  
Toronto, ON Canada

Jim Konte  
Managing Director  
Hanover Square Partners  
Park City, UT USA

Paul Koonar  
Partner  
CAASA - Canadian Association of  
Alternative Strategies & Assets  
Toronto, ON Canada

John Kutner  
Director of Institutional Sales  
StoneX  
New York, NY USA

Chad Kutney  
Director  
Ruffer  
New York, NY USA

Herman Laret  
Principal  
Laret Capital Partners  
New York, NY USA

Richard Leahy  
Principal  
Episteme Capital  
West Palm Beach, FL USA

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

# CONFERENCE ATTENDEES

FINAL

Dan Ledbetter  
Managing Director,  
Busines Development  
Lighthouse Group  
Palm Beach Gardens, FL USA

Marc Lorin  
Chief Investment Officer  
New Hyde Park Alternatives  
Wheaton, IL USA

DeWayne Louis  
Founding Partner  
Versor Investments  
New York, NY USA

Jeff Malec  
Managing Director & Partner  
RCM Alternatives  
Chicago, IL USA

Christopher Mandas  
Director, Hedge Funds  
Cliffwater  
New York, NY USA

William Marr  
Senior Managing Director,  
Head Business Growth  
Welton Investment Partners  
Carmel, CA USA

Lisa Martin  
Director of Business Development  
Crabel Capital Management  
Los Angeles, CA USA

Adam McConky  
Head of Volantis Team &  
Co-Lead Portfolio Manager  
Lombard Odier Asset Management  
London, United Kingdom

Ryan McCreadie  
Managing Partner  
L'Enfant Capital Partners  
Arlington, VA USA

Justin McEntee  
Partner, Chief Strategy Officer  
Logica Capital Advisers  
Los Angeles, CA USA

Roxton McNeal  
Former Managing Director and Head  
of Strategy and Allocation UPS  
Roxton Investment Consulting, LLC  
Cumming, GA USA

Paul Michalowski  
Head of Global Marketing  
Zweig-DiMenna Associates, Inc.  
New York, NY USA

Ryan Mitchell  
Director - Institutional Sales  
StoneX  
Chicago, IL USA

Mayank Mohan  
Managing Principal  
Museum Mile Funds  
New York, NY USA

Joseph Mooney  
Executive Director  
UBS  
New York, NY USA

Ayushman Nath  
EMEA Associate  
Oraclum Capital  
New York, NY USA

Graham Officer  
Managing Director, Capital  
Formation & Client Coverage  
Brevan Howard  
New York, NY USA

William Park  
Chief Investment Officer  
Altisma  
Greenwich, CT USA

Georgios Perdikommatis  
Director, Head of dbSelect & dbMA+  
Structuring DB Investment Solutions  
Deutsche Bank  
London, United Kingdom

Mike Philbrick  
Chief Executive Officer  
ReSolve Asset Management  
Toronto, Ontario Canada

Kristin Rames  
Director of Client Strategy  
One River Asset Management  
Stamford, CT USA

# CONFERENCE ATTENDEES

FINAL

David Regan  
Director, Capital Consulting  
Societe Generale  
New York, NY USA

Gwyn Roberts  
Head of Manager Relations  
PivotalPath  
New York, NY USA

Oren Rosen  
Senior Portfolio Manager  
Welton Investment Management  
Carmel, CA USA

Jackie Rosner  
Managing Director  
PAAMCO Prisma  
Newport Beach, CA USA

Michael Schaus  
Chief Investment Officer,  
Portfolio Manager  
Zweig-DiMenna Associates, Inc.  
New York, NY USA

John Segrich  
Portfolio Manager  
Lombard Odier Asset Management  
(USA) Corp  
New York, NY USA

Michel Serieyssel  
Head of Business  
Development - Americas  
Metori Capital Management  
Paris, France

Mark Shore  
Director and Economist  
CME Group  
Chicago, IL USA

Tyler Sloman  
Managing Partner  
BWP Capital  
Bohemia, NY USA

Marc Sperling  
Institutional Investor  
First New York  
New York, NY USA

Michael Stendler  
Managing Director  
O'Brien Investment Group  
Chicago, IL USA

Faisal Syed  
Chief Executive Officer &  
Chief Investment Officer  
LH PAMLI Partners  
New York, NY USA

Mark Tower  
Executive Director, Head of Business  
Development & Investor Relations  
Asset Management One USA Inc  
New York, NY USA

Prash V.Srinivasan  
President & Portfolio Manager  
Avad Capital Management Inc  
St Petersburg, FL USA

Heather Walsh  
Director, Institutional Sales  
StoneX  
Chicago, IL USA

Roger Welp  
Director of Alternative Investments  
RCM Alternatives  
Chicago, IL USA

Jonathan Young  
Senior Analyst  
New Hyde Park Alternatives  
Wheaton, IL USA

Marc Zuccaro  
Managing Principal,  
Portfolio Manager  
Golden Eagle Strategies  
Delray Beach, FL USA

Robert Zuccaro  
Founder & Chief Investment Officer  
Golden Eagle Strategies, LLC  
Delray Beach, FL USA

Meg Bode  
MBode@TalkingHedgeEvents.com  
516-676-2717

[www.TalkingHedgeEvents.com](http://www.TalkingHedgeEvents.com)