



TALKING HEDGE



AUSTIN 2026

PROTECTING PORTFOLIOS WITH DIVERSIFYING STRATEGIES

PLUS

EVOLVING MANAGERS & INVESTORS EXCHANGE

MAY 20 & 21, 2026 | THE STEPHEN F. AUSTIN ROYAL SONESTA HOTEL

CONFERENCE GUIDE

CONFERENCE SPONSORS





Welcome to Talking Hedge Austin 2026. We're honored that you enjoy coming together to meet and talk, and proud to celebrate our 10-Year Anniversary right back where it all started in 2016.

The evolution of hedge fund solutions, and how investors use these strategies to mitigate risk and improve outcomes, is remarkable. We have gathered another exceptional mix of industry luminaries to share their views on the current challenges and, of course, the resulting opportunities. This year our conference theme is *Protecting Portfolios with Diversifying Strategies*.

As recent regime shifts rattle global markets, the role of hedge funds in an institutional portfolio rises in importance and value. Increasingly, risk mitigation is widely revered as one of the key hallmarks of these diversifying strategies. Creativity abounds as this solutions-oriented culture continues to gain steam and hedge funds are relied upon for both offense and defense in answer to the needs of sophisticated investors.

Talking Hedge is thankful to partner with a stellar cast of esteemed fund managers and solutions providers to create a timely agenda that will dig deep into today's key market risks and how to mine the opportunities such challenges engender. Please note that we operate under Chatham House Rule.

We also are pleased to present the pre-conference luncheon and program, *Evolving Managers & Investors Exchange*, curated for investors seeking access to early-stage and evolving managers/strategies and fresh ideas.

Hats off to our industry partners whose ideas for discussion themes will be brought to life:

Deutsche Bank, Fidelity Investments, Franklin Templeton, GMC Grosvenor, Morgan Stanley Investment Solutions, Titan Advisors, Welton Investment Partners, Wilshire, Zweig-DiMenna Associates, Asset Management One USA, Fulcrum Asset Management, HedgeFacts, III Capital Management, J E Moody & Company, Lombard Odier Asset Management, Metori Capital Management, New Hyde Park Alternative Funds, O'Brien Investment Group, RCM Alternatives, Ruken, Schultze Asset Management, Snoboll Capital, and UBS.

Get ready to engage with our illustrious lineup of speakers who are ready to share stories with you, inspire you, challenge you, and spark fresh ideas and relationships. We are thankful for their time and enthusiasm to share their perspectives and expertise.

We hope you enjoy the program and your time together!

Meg Bode
Founder

CONFERENCE PROGRAM

WEDNESDAY, MAY 20

12:00-4:00

EVOLVING MANAGERS & INVESTORS EXCHANGE, LUNCHEON & PROGRAM

Manager Presentations:

Fidelity Investments: Sladja Carton & Roberto Croce, PhD
Institutional Portfolio Manager, Liquid Alternatives & Portfolio Manager, Multi-Asset Systematic Strategies

Fulcrum Asset Management: Luke Sadrian
Partner and Commodities Portfolio Manager

J E Moody & Company: John Moody
Managing Member

Lombard Odier Asset Management: Rameez Saleh
Portfolio Manager

Schultze Asset Management: Dean Crowder
Global Head of Strategic Business Development

Snoboll Capital: Noah Snyder
Founder and Portfolio Manager

Welton Investment Partners: William Marr & Oren Rosen, PhD
Senior Managing Director, Head Business Growth & Senior Portfolio Manager

Zweig-DiMenna Associates: Michael Schaus & Matthew Finkelstein
Chief Investment Officer, Global Macro Fund & Portfolio Manager, Global Macro Fund

What Allocators Look for in Evolving Managers:

Moderator: Joseph Mooney
Executive Director, UBS

Panelists: John Hynes
Chief Executive Officer, HedgeFacts

Gordon Nicholson, CFA, CAIA, ESQ.
Senior Vice President/Portfolio Manager Franklin Templeton Investment Solutions

Robert Rafter, CFA
Managing Director, Head of Research, AIP Hedge Fund Solutions, Morgan Stanley Investment Management

Jackie Rosner
Managing Director, PAAMCO/Prisma

Kunjal Shah
Managing Director, Head of Hedge Fund Research, Managed Accounts, Wilshire

5:00-7:00

Welcome Reception

THURSDAY, MAY 21

7:00-8:00

NETWORKING BREAKFAST

8:00-8:15

WELCOME REMARKS

8:15-9:15

AS THE USE OF HEDGE FUNDS CONTINUES TO EVOLVE, INVESTORS EMBRACE DIVERSIFIERS

Moderator: Christine Chang
Senior Research Analyst, MALTS, Meketa Investment Group

Panelists: George Evans, CFA
Managing Director, Relative Value Sector Head, Aksia, LLC

Robert Rafter, CFA
Managing Director, Head of Research, AIP Hedge Fund Solutions, Morgan Stanley Investment Management

Jackie Rosner
Managing Director, PAAMCO Prisma

Rameez Saleh
Portfolio Manager, Lombard Odier Asset Management

Kunjal Shah
Managing Director, Head of Hedge Fund Research, Managed Accounts, Wilshire

9:15-10:15

A FRESH LOOK AT ABSOLUTE RETURN: NEW INFLOWS AND WHAT'S DRIVING INVESTOR INTEREST & OUTCOMES

Moderator: John Hall, CFA
Investment Manager, Teacher Retirement System of Texas

Panelists: Jenny Dawson
Head of QIS Solutions and Director, QIS Structuring, Deutsche Bank

Keith Friedman
Managing Director, Absolute Return, GCM Grosvenor

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

Michael Schaus
Chief Investment Officer, Global Macro Fund, Zweig-DiMenna Associates

- 10:15-10:45 **NETWORKING COFFEE AND SNACKS**
- 10:45-11:45 **ENGINEERING DIVERSIFICATION: HOW QIS STRENGTHENS PORTFOLIOS**
- Moderator: Anna Fortus
Executive Director, US Pension, Endowment, and Foundation Derivatives Sales, J.P. Morgan
- Panelists: Jiro Fujisawa
Co-Head of Portfolio Management, Quantitative Strategies, Asset Management One, USA
- Roxton McNeal, CFA, CAIA, CIPM
Portfolio Manager and Head of QIS, III Capital Management
- Lawrence Powell
President, LP Institutional, Inc.
- Ramon Verastegui, PhD
Managing Director, Kairos Investment Advisors
- 11:45-12:45 **DETAILS MATTER: HOW DESIGN DECISIONS IN SYSTEMATIC STRATEGIES DRIVE OUTCOMES**
- Moderator: Jeff Malec, CAIA
Managing Director and Partner, RCM Alternatives
- Panelists: Nicolas Gausse, PhD
Chief Executive Officer and Co-Chief Investment Officer, Metori Capital Management
- Paul Kreiselmaier, CFA
Senior Principal, Hedge Funds, Institutional Consulting, Cerity Partners
- Oren Rosen, PhD
Senior Portfolio Manager, Welton Investment Partners
- Michael Stendler
Managing Director, O'Brien Investment Group
- 12:45-1:45 **NETWORKING LUNCHEON**
Compliments of HedgeFacts
- 1:45-2:45 **“TREND PLUS”: BALANCING ALPHA GENERATION AND RISK OUTCOMES**
- Moderator: Ronan Cosgrave
Partner, Albourne America LLC
- Panelists: Roberto Croce, PhD
Portfolio Manager, Multi-Asset Systematic Strategies, Fidelity Investments
- Bradley Davis, CFA
Institutional Investor
- Gordon Nicholson, CFA, CAIA, ESQ
Senior Vice President/Portfolio Manager, Franklin Templeton Investment Solutions
- Timothy Sweeney, CAIA
Managing Director, Head of Public Markets, Texas Municipal Retirement System
- 2:45-3:15 **NETWORKING COFFEE AND SNACKS**
- 3:15-4:15 **COMMODITIES INVESTING AT THE INTERSECTION OF DEGLOBALIZATION AND MONETARY REGIME CHANGE**
- Moderator: Joe Wade
Partner and Portfolio Manager, Brown Advisory
- Panelists: Alex Baudoin
Principal, Director Global Macro & Tactical Strategies, Titan Advisors
- John Moody
Managing Member, J E Moody & Company
- Abdalla Ruken
Founder & Chief Investment Officer, Ruken Family Office
- Luke Sadrian
Partner and Commodities Portfolio Manager, Fulcrum Asset Management
- Jonathan Thomas
Senior Vice President, Rothschild Family Office
- 4:15-5:00 **KEYNOTE PRESENTATION:**
- EVERYTHING, EVERYWHERE, ALL AT ONCE: HOW MARKETS CAN MAKE SENSE OF TRADE, TECH, & GEOPOLITICS**
- Presenter: Francis J. “Frank” Kelly
Founder & Managing Partner, Fulcrum Macro Advisors
- 5:30-7:00 **CLOSING COCKTAILS & NETWORKING**
- 6:00-9:30 **CLOSING DINNER – COMPLIMENTS OF HEDGEFACTS, ASSET MANAGEMENT ONE, AND ADM FOLLOWED BY:**
- TALKING HEDGE’S 10-YEAR ANNIVERSARY PARTY FEATURING WELDON HENSON AND HIS 4 PIECE BAND.**
Stubb’s Bar-B-Q Downtown - 801 Red River Street, Austin, TX

SPEAKER BIOS



ALEX BAUDOIN

Principal, Director, Global Macro & Tactical Strategies

Alex Baudoin serves as Principal, Director, Macro & Tactical Strategies at Titan Advisors. He is responsible for due diligence and new manager identification across macro, commodity, relative value, and multi-strategy hedge funds. He also sits on the firm's investment risk committee, evaluating manager specific and broader market risks across all of Titan's strategies and portfolios. Alex joined Titan in November 2018 as a Research Analyst in the Global Macro, CTA, and Multi-Strategy space where he focused on manager sourcing and due diligence. Prior to Titan, he worked as a commodity and equity trader. Alex graduated from Tufts University in 2015 with a B.A. degree in economics. He holds NFA Series 3 and SWAP proficiency.



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.



CHRISTINE CHANG

Senior Research Analyst, MALTS, Meketa

Christine Chang is a Senior Research Analyst for Marketable Alternatives within the Public Markets team at Meketa, where she is committed to helping build the institutional expertise clients need to understand and select investment solutions that support their objectives of reducing volatility and stabilizing their portfolios. Christine began her career as an institutional investor at General Motors Asset Management, a corporate pension, gaining experience within a large corporate framework across public and private equity, fixed income, and real estate. She later transitioned to public service at the Hawai'i Employees' Retirement System, a public pension, where she was the Investment Officer for the \$6 billion Diversifying Strategies portfolio as well as developed their responsible investing program. She graduated from Duke University, where she developed a strong analytical foundation that has informed her career in portfolio management and investment research. Across roles, Christine is known for her thoughtful, data-driven approach and her ability to translate complex market dynamics into actionable insights for decision-makers.



RONAN COSGRAVE, CFA

Partner, Albourne America LLC

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

SPEAKER BIOS



ROBERTO CROCE, PHD

Portfolio Manager, Multi-Asset Systematic Strategies, Fidelity Investments

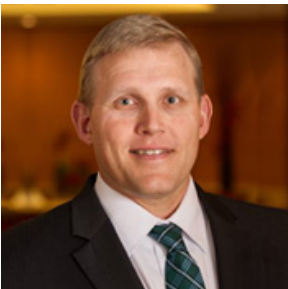
Roberto Croce is a portfolio manager for Multi-Asset Systematic Strategies within the Quantitative Research Investments (QRI) division at Fidelity Investments. Fidelity Investments is a leading provider of investment management, retirement planning, portfolio guidance, brokerage, benefits outsourcing, and other financial products and services to institutions, financial intermediaries, and individuals. QRI supports our investors with timely and actionable insights, manages systematic products and solutions, and enables scale through adoption of common platforms. In this role, Dr. Croce leads the development, management, and ongoing evolution of trend-following managed futures strategies. Before joining Fidelity in 2024, Dr. Croce worked at Newton Investment Management as senior portfolio manager and head of liquid alternatives, where he was responsible for product development and portfolio management. Prior to that, Dr. Croce worked in various roles at Salient Partners, where he eventually led Salient's quantitative platform including research, strategy development, portfolio management, and institutional marketing. He has been in the financial industry since 2011. Dr. Croce earned his Bachelor of Science in economics from Penn State University and his PhD in economics from the Ohio State University.



DEAN CROWDER

Global Head of Strategic Business Development, Schultze Asset Management

Mr. Dean W. Crowder, III, is Global Head of Strategic Business Development at Schultze Asset Management, LP and has represented hedge funds and alternative investments to global institutions and family offices for over 28 years. He leads Schultze's overall marketing, sales, and client efforts while assisting in strategic business planning initiatives as the firm leverages its deep experience in event-driven, distressed and special situations investing. Mr. Crowder is widely recognized as a strategist and marketer of alternative investments while building brand recognition for investment managers internationally. Recently, he was Managing Director | Global Head of Strategic Business Development for Rotella Capital Management, Inc., a systematic quantitative hedge fund. Prior to Rotella, he founded Alpha Alternative Investments, LLC, a Texas-based RIA, providing consulting, and representation of alternative investments. Previously, he was Marketing Director at Vicis Capital, LLC; Managing Director | Institutional Sales -- Asia & Europe for Kenmar Global Investment Management; and Director of Global Marketing at Alpha Investment Management, LLC, a hedge fund of funds later acquired by Safra Asset Management, Inc. Mr. Crowder holds a Bachelor of Arts degree in Economics from Michigan State University.



BRADLEY DAVIS, CFA

Institutional Investor

Mr. Davis is an experienced investor with more than 25 years of financial markets experience and knowledge built over multiple cycles. Excited to sustain growth in the next opportunity, a culture emphasizing accountability, mentorship, and ongoing professional development are key considerations. Most recently serving as the Head of Public Fixed Income for Texas Treasury Safekeeping Trust Company, he coordinated the team's due diligence efforts in long-only fixed income (over \$17 billion across the credit spectrum) and was also lead portfolio manager for absolute return-oriented hedge funds (diversified holdings totaling ~\$3.6 billion). Prior to moving to Austin in 2020, 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 well over a decade. Given familiarity across the organization's four bespoke portfolios, Mr. Davis was 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.

SPEAKER BIOS



JENNY DAWSON

Head of QIS Solutions, Director, QIS Structuring, Deutsche Bank

Jenny Dawson is a structurer at Deutsche Bank, based in London. She specialises in Quantitative Investment Strategies (QIS), designing bespoke investment solutions for pension funds, insurers, asset managers and other institutional investors. Her work focusses on custom QIS implementations tailored to each client's constraints and objectives and is fully multi-asset, covering tail risk hedging, absolute return and smart beta return profiles.



GEORGE EVANS, CFA

Managing Director, Relative Value Sector Head, Aksia

George is a Managing Director on the Hedge Funds team and has over 17 years of experience in alternative investments. He is responsible for sourcing, conducting investment research, and evaluating managers across relative value strategies. George also works with global investors focused on hedge funds, directing strategic portfolio construction, management, and providing customized investment decisions. Prior to joining Aksia in 2019, George was a Strategy Head focusing on global macro & trading strategies at UBP Asset Management where he was responsible for sourcing and due diligence across discretionary global macro, fixed income arbitrage and commodity strategies. Before that, George worked as a research analyst at Ermitage UK Ltd. where he focused mostly on long/short equity strategies in Europe. George graduated from Bayes Business School, City, University of London with a BS in Banking and International Finance. He is a CFA charterholder.



MATTHEW FINKELSTEIN

Portfolio Manager, Global Macro Fund, Zweig-Di-Menna Associates

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



ANNA FORTUS

Executive Director, US Pension, Endowment, and Foundation Derivatives Sales, J.P. Morgan

Anna Fortus is an Executive Director in JPMorgan's Commercial & Investment Bank. She sits on the US Pension, Endowment, and Foundation derivatives sales team, delivering cross-asset derivative product and Quantitative Investment Strategies (QIS)/Risk Premia to US Asset Owners and their respective asset managers and fiduciaries. Anna also heads QIS distribution efforts for the broader US equity sales business. Anna has held various roles, having joined JPMorgan in 2009 including US High Grade Strategy & Credit Derivatives Research, Institutional Commodity Sales, and Equity Derivatives Sales. She holds a BA in Economics and Political Science from Columbia University. Anna lives in New York City with her husband and two children.

SPEAKER BIOS



KEITH FRIEDMAN

Managing Director, Absolute Return Strategies, GCM Grosvenor

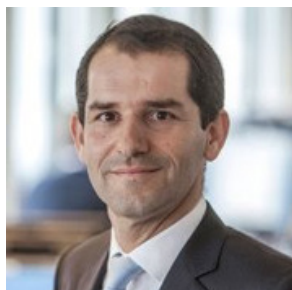
Mr. Friedman is responsible for portfolio strategy for GCM Grosvenor's Belmont Harbor Strategy. He also serves as a Portfolio Manager for a number of multi-strategy portfolios and for other specialized strategies and custom mandates. Mr. Friedman leads activities related to the construction, implementation, 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.



JIRO FUJISAWA

Co-Head of Portfolio Management, Quantitative Strategies, Asset Management One, USA

Jiro Fujisawa serves as AMO USA's Portfolio Manager and is in charge of portfolio construction and implementation process. Prior to joining AMO USA in 2021, Mr. Fujisawa was at AMO Tokyo's Products Development Group from 2018, where he took a leading role in the successful launch of several UCITS funds and Cayman-domiciled funds, and subsequently transferred to the quants investment team as Fund Manager. He began his career in the asset management industry in 2013, as a Fund Manager at AMO Tokyo's alternative investments arm (f.k.a. Mizuho Global Alternative Investments, Ltd.) where he managed FoHF and Japanese pension fund accounts. Mr. Fujisawa graduated from Imperial College London with a MEng degree in Mechanical Engineering in 2012.



NICOLAS GAUSSEL, PHD

President & Co-Chief Investment Officer, Metori Capital Management

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



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.

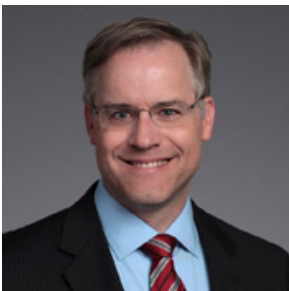
SPEAKER BIOS



FRANCIS J. "FRANK" KELLY

Founder & Managing Partner, Fulcrum Macro Advisors

Frank is the Founder and Managing Partner of Fulcrum Macro Advisors, a geopolitical risk advisory firm focusing on the intersection of global markets and political and economic issues globally. He launched Fulcrum after a 30-year career on Wall Street and in the Federal Government. Frank began his career at the White House as a writer for President Ronald Reagan and went on to serve in Reagan's Office of Political Affairs. He remained at the White House to serve as a writer for President George H.W. Bush and then to serve as a political appointee at the Justice Department in the Office of Policy Development focusing on national security and international issues. From there, Frank went to the US Securities and Exchange Commission, being appointed Senior Policy Advisor to the Chairman and Chief Spokesman for the Commission as well as a member of the SEC Senior Staff. He then joined Merrill Lynch Investment Banking in New York serving as Chief of Staff and Global Head of Marketing for Investment Banking, Sales & Trading. He later returned to Washington DC to establish Charles Schwab & Co.'s first Global Government & Regulatory Affairs operation where he served as both the Senior Vice President and Global Head of Government Affairs as well as the firm's first Chief Political Strategist. Frank joined Deutsche Bank in 2003 as the Bank's first Head of Government Affairs and then later, Global Coordinator for Government & Public Affairs. He was also the Bank's first Chief Political Strategist. In this role he advised the Bank's top institutional clients globally on US and geopolitical issues. Frank serves as a Senior Advisor to The Scowcroft Group, a global business advisory firm with an emphasis on emerging markets. He is also as an adjunct professor at The Catholic University School of Business where he teaches on Business Intelligence, political risk, and strategic planning. He is also a Senior Associate with the Americas Program at the Center for International and Strategic Studies (CSIS) in Washington where he focuses on Latin American politics, economics, and trade. Frank serves on the board of directors of the Jerome Lejeune Foundation of America. He is a member of the Council on Foreign Relations, the International Institute for Strategic Studies, the American Council on Germany and American Institute for Contemporary German Studies. He resides outside Washington DC in Great Falls, Virginia with his wife, Maura, on their working farm, Open Door Farm.



PAUL KREISELMAIER, CFA

Senior Principal, Hedge Funds, Institutional Consulting, Certy Partners

Mr. Kreiselmaier is a Senior Principal in the Seattle office where he is primarily responsible for investment strategy, due diligence, portfolio construction recommendations and relationship building across the hedge fund universe, and oversight of the firm's hedge fund program. Prior to joining Certy Partners, Mr. Kreiselmaier served as a Managing Director of Hedge Funds at Verus, a leading institutional investment advisory firm that merged with Certy Partners in 2026. Previously, he held positions at Russell Investments and Mellon Capital Management.



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



JEFF MALEC, CAIA

Managing Director & Partner, RCM Alternatives

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



WILLIAM MARR

Senior Managing Director, Head Business Growth, 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.



ROXTON MCNEAL, CFA, CAIA, FRM

Portfolio Manager, Head of QIS, III Capital Management

Roxton McNeal is a distinguished investment professional with extensive expertise in quantitative investment strategies, portfolio management, and pension plan oversight. Currently, he serves as Portfolio Manager and Head of QIS at III Capital Management (triple i). Before III, 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 while optimizing portfolio outcomes. Prior to joining UPS, Roxton held senior roles at General Motors Asset Management (GMAM), managing \$20 billion in long-duration fixed-income assets. He played a critical role in executing a landmark \$25 billion pension risk transfer agreement and in developing sophisticated quantitative analytics to enhance asset-class and pension-plan performance. 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. He is also an accomplished author, with publications in industry magazines and journals, including his notable piece "The Early Bird Catches the Trend" in The Journal of Investing.

SPEAKER BIOS



JOHN MOODY, PHD

Founder & Chief Investment Officer, J E Moody & Company

John Moody, Ph.D. founded J E Moody & Company LLC (JEM) in 2001 and launched the Alpha Diversified strategy in 2006. Dr. Moody oversees the firm's research, portfolio management, trading, and business. Dr. Moody has over 30 years of experience trading futures and options. He has published over 65 scientific papers in computational finance, machine learning, and theoretical physics. His academic appointments have included Principal Investigator at Berkeley's International Computer Science Institute, Professor of Computer Science and Director of the Computational Finance Program at Oregon Health & Science University, and faculty positions in Computer Science and Neuroscience at Yale University. Dr. Moody is a member of the Advisory Board and a past General Chair of Neural Information Processing Systems (NeurIPS.cc), the world's premier machine learning research conference. He received his Ph.D. and MS in Physics from Princeton and BA Honors in Physics at the University of Chicago.



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.



GORDON NICHOLSON, CFA, CAIA, ESQ.

Senior Vice President, Portfolio Manager, Franklin Templeton Investment Solutions

Gordon Nicholson is a senior vice president and portfolio manager for institutional portfolios, including absolute return, risk mitigation strategies, and liquid alternatives, serving public pensions, endowments, corporate pensions, and private banks at Franklin Templeton Investment Solutions (FTIS). Mr. Nicholson is a member of the FTIS Alternatives Investment Committee. He joined K2 Advisors, an alternative investment firm that merged with Franklin Templeton Investment Solutions, in 2017. Prior to joining K2 Advisors, Mr. Nicholson was global head of alternative solutions at Citi Private Bank from 2013 through 2017. While at Citi, he managed nearly 40 portfolios for institutions, family offices, and high-net-worth individuals; led a team of portfolio managers and analysts; and served as chair of the alternative investment committee. In 2012, he held a role in enterprise risk management at Rimrock Capital Management, supporting growth and development efforts for an institutional fixed income relative value hedge strategy. Mr. Nicholson's hedge fund experience began in 2005 at Kenmar-Olympia Group, where his roles evolved from analyst to sector head to portfolio manager and investment committee member. Prior to that, he served as manager of credit and pricing at Bombardier Structured Credit and as a senior fixed income analyst at Athena Capital (Thinking Investments). Previous roles also include fixed income analyst at PIMCO and work within the legal department of Franklin Templeton. Mr. Nicholson graduated from Bishop's University in 1988 with a Bachelor of Arts degree in political science and economics and received a Juris Doctor from Vermont Law School in 1993.



LAWRENCE POWELL

President, LP Institutional

Lawrence R. Powell is an institutional multi-asset investor and allocator with more than three decades of experience as a trader, investor across public pensions, hedge funds, and advisory work. His background spans public and private markets, with a longstanding focus on alternatives, portfolio construction, manager due diligence, selection, portfolio construction, risk management, and governance. His institutional investor experience began at the Teacher Retirement System of Texas on the Alternative Assets team, working across private equity, real assets, and hedge funds before going on to create, build, and lead the system's External Public Markets division. He later served as Deputy Chief Investment Officer at Utah Retirement Systems, where he helped oversee the entire portfolio across both public and private markets. Earlier in his career, Powell founded and led Rohden Funds Management, a systematic macro/multi pm investment firm. He now leads LP Institutional, working with both GPs and LPs, engaging in knowledge sharing on allocation, governance, manager selection, fee alignment, & the design of resilient, downside-aware portfolios.

SPEAKER BIOS



ROBERT RAFTER, CFA

Portfolio Manager, Head of Research, AIP Fund Solutions, Morgan Stanley Investment Management

Rob is a portfolio manager and head of research on the AIP Hedge Fund Solutions team within MSIM, responsible for overseeing the investment process and team across hedge fund strategies, including equity long/short, credit, quantitative, global macro and relative value. He is also a member of the Investment Committee. Rob joined Morgan Stanley AIP in 2011 and has 20 years of industry experience. Prior to joining the firm, he served as vice president responsible for hedge fund investments at Colchis Capital Management. Previously, Rob was an analyst in the Fixed Income Division at Lehman Brothers, where he executed repurchase agreements and securities lending transactions as a member of the central funding desk. Rob also worked as a journalist for several years. Rob received a B.A. in government from Georgetown University. He is a member of the Bond Club of Philadelphia and the CFA Society of Philadelphia. Rob holds the Chartered Financial Analyst designation.



OREN ROSEN, PHD, CAIA

Senior Portfolio Manager, Welton Investment Management

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



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.

SPEAKER BIOS



ABDALLA RUKEN, PHD

Founder & Chief Investment Officer, Ruken Family Office

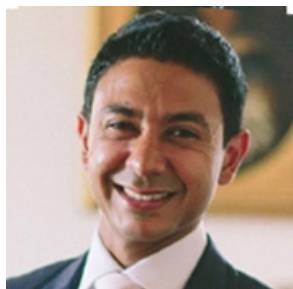
Abdalla Ruken is the Founder and Chief Investment Officer of Ruken Family Office. He previously spent 16 years at Polar Asset Management as CRO, Deputy CIO, Co-CIO, and Senior Partner, where he played a central role in scaling the firm from under \$1B to over \$7B in AUM. Starting as CRO, he institutionalized the firm's risk and operational framework before stepping into the portfolio leadership role, where he led portfolio construction, capital allocation, and managed the center book. Abdalla also led the buildout and rebuild of multiple strategies, including structured credit, fixed income, SPACs, convertibles, and power and gas. He is regarded as one of Canada's foremost hedge fund builders and managers, with a track record of identifying and developing world-class portfolio managers from diverse backgrounds, including bank trading desks, risk professionals, merchant energy traders, and early-career talent. Prior to Polar, Abdalla spent 11 years at Scotiabank in progressively senior risk roles, rising to VP Risk Management where he adjudicated tens of billions in structured transactions, hedge fund financing, and leverage facilities. He holds a PhD in Physics.



LUKE SADRIAN

Partner, Commodities Portfolio Manager, Fulcrum Asset Management

Luke is a Partner and Commodities Portfolio Manager at Fulcrum, having joined the firm in 2025. Prior to Fulcrum, Luke was at Rokos Capital Management where he was a Partner and Investment Officer for two years. Over the last three decades, his prior roles have included being CIO at two specialist commodities hedge funds, Sadrian Bowman Capital and Commodities World Capital, a Commodities Portfolio Manager at Moore Capital, a Commodities Portfolio Manager and Partner at Brevan Howard and Head of Metals Derivatives Trading at Goldman Sachs. Luke began his career out of the Wharton School of The University of Pennsylvania as an exchange based options market maker at Cooper Neff and then Swiss Bank O'Connor. Luke has BSc in Economics from the University of Pennsylvania.



RAMEEZ SALEH

Portfolio Manager, Lombard Odier Asset Management

Rameez Saleh is a Portfolio Manager at Lombard Odier Investment Managers (LOIM), where he applies an investment framework refined over more than two decades in public equities. He began developing his investment playbook at Ziff Brothers Investments, where he spent 10 years as a Director focused on TMT and commodities investing. Throughout his career, Rameez has maintained a continuous focus on building and evolving proprietary archetypes, pattern recognition systems, and analytical frameworks designed to create a disciplined, efficient, and highly focused investment process. He further developed and implemented this approach at Aravt Global, where he was a founding partner for seven years, and later at Brooklyn Capital, the investment firm he founded and led from 2020 to 2023 prior to joining LOIM. Rameez began his career as an Equity Research Associate at Thomas Weisel Partners. He graduated from Yale University in 2002 with a Bachelor of Science in Electrical Engineering and Economics.



MICHAEL SCHAUS

Chief Investment Officer & Portfolio Manager, Global Macro Fund, 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



KUNJAL SHAH

Managing Director, Head of Hedge Fund Research, Managed Accounts, New York Office, Wilshire
Kunjal Shah is a Managing Director and Head of Hedge Fund Research on Wilshire's alternative managed accounts team. He joined the firm in December 2023 as part of the Lyxor U.S. acquisition. Prior to joining Wilshire, Mr. Shah was the Global Head of Hedge Fund Research at Lyxor Asset Management responsible for supervising the portfolio management and hedge fund research teams, as well as developing advisory investment offerings and customized hedge fund solutions. He brings more than 20 years of experience in hedge fund manager selection, due diligence, and monitoring to his position. Prior to Lyxor, he was employed by Arden Asset Management, where he was a partner and managing director. Prior to that, he was a director and co-head of hedge fund credit risk management for the Americas at Deutsche Bank AG. He was also an integral member of the hedge fund credit risk management team at Goldman Sachs in New York, where he led due diligence and monitoring of hedge funds. Mr. Shah earned a bachelor's degree in economics from the University of Manchester and holds an MBA from the Kellogg School of Management at Northwestern University.



NOAH SNYDER

Founder & Portfolio Manager, Snoboll Capital Management

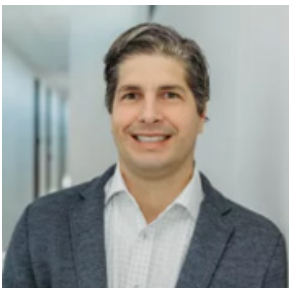
Noah Snyder is the Founder and Portfolio Manager at Snoboll Capital, a concentrated long/short equity strategy with a unique focus on programmatic acquirers globally. Before founding Snoboll Capital in August 2023, Noah Snyder spent over 15 years building and leading top-performing investment strategies across hedge funds, mutual funds, and family offices. He began his career in 2007 as an investment analyst at the family office of Continental Grain Company. He next earned his MBA from Columbia Business School, where he was in the prestigious Value Investing Program, and served as the President of the Investment Ideas Club. In 2012-2019, Noah helped to launch and build Incline Global, a long/short equity hedge fund that was backed by some of the world's most prominent investors. As the firm's sole MD, he helped grow Incline into a Barron's Top 100 hedge fund globally with >\$1bn in AUM and Institutional Investor recognized him as a Hedge Fund Rising Star. From 2019-2023, Noah was a Senior Analyst at American Century Investments, a \$225+ billion asset manager, where he helped manage its International Small Cap strategy. His primary focus was on the Nordics, Western Europe, and Australia, regions that remain central to Snoboll's current edge. Noah remains actively involved with Columbia's Value Investing Program, where he mentors students and guest lectures on his differentiated research frameworks. He currently lives in Long Island with his wife and three kids.



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, Head of Public Markets, Texas Municipal Retirement System

Timothy Sweeney is the Managing 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 Bachelor's in Finance from the University of Connecticut and holds the CAIA designation.

SPEAKER BIOS



JONATHAN STANLEY THOMAS

Senior Vice President, Rothschild Family Office

Jonathan Thomas is a Senior Vice President of the Rothschild Family Office, where he built out their commodity futures trading desk (Series 3, 30, and 31) and manages a long-only equities portfolio and alternatives sleeve which consists of private equity, private credit, real estate, oil and gas, and physical commodities. Prior to that, he spent 14 years both on the buy-side and sell-side at firms such as Morgan Stanley, Apex Clearing Corporation, Hilltop Securities, Charles Schwab, and Ameriprise Financial (Series 7 and 66). During his career, he also launched a commodities hedge fund structured as a CPO (Commodity Pool Operator) called Castlehedge Capital Management, where he participated as a non-designated market maker of 1256 contracts. While on the sell-side, he was also involved in the GameStop/AMC debacle, where he assisted in the sell-only halt of more than 23 million customer accounts which ultimately saved the financial system from a systemwide default of a large DTC clearing member. He graduated magna cum laude with his B.S.B. from the University of North Texas and is a former Board Member of the Dallas Security Traders Association.



RAMON VERASTEGUI, PHD

Founder & Chief Investment Officer, Kairos Investment Advisors

Dr. Ramon Verastegui is the Founder & Chief Investment Officer of Kairos Investment Advisors, a quantitative hedge fund established in New York in 2020, specializing in derivatives and volatility trading across both tactical and systematic strategies. Prior to founding Kairos, he served as Senior Portfolio Manager at PSP Investments, a Canadian pension fund with over \$240 billion in AUM, where he headed the Quantitative Strategies team and launched the risk recycling strategies. In addition, he was also a member of the Public Markets Investment Committee and led the global corporate initiative to define the quantitative ambitions of PSP across all investment teams. Before PSP, Dr. Verastegui spent 13 years as a Managing Director at Société Générale in New York, leading multi-asset strategy and quantitative solutions teams advising hedge funds, asset managers, and institutional clients across global macro, volatility, risk premia, quantitative investment strategies and tail risk hedging. His team earned multiple top industry rankings. In 2017 he was inducted into the Volatility Investing Hall of Fame and in early 2024, he was selected as one of the leading practitioners in volatility & systematic investing for 2023 by EQDerivatives. He holds a Ph.D., M.Phil., and M.S. in Applied Physics and Mathematics from Columbia University, a Master's and DEA in Engineering from CentraleSupélec in Paris, and undergraduate degrees from ICAI in Madrid. He has also been a Visiting Scholar at the Plasma Science and Fusion Center at MIT. Dr. Verastegui is regularly cited in the Wall Street Journal, Bloomberg, the Financial Times, and IFR, and is the founding president of the Columbia University Club of Spain. He has also served on the Columbia University Advisory Committee for Socially Responsible Investing from 2015 to 2018.



JOE WADE

Partner and Portfolio Manager, Brown Advisory

Joe is a partner and portfolio manager. Joe joined Brown Advisory in May 2018 as a result of the combination between Brown Advisory and Meritage Capital, where he served as Chief Investment Officer. Joe has more than 38 years of industry experience and helped develop Meritage Capital's investment philosophy. He also chaired Meritage Capital's investment committee and oversaw manager due diligence, portfolio construction and risk management of Meritage Capital's commingled funds, liquid alternatives strategies and custom portfolio solutions. Prior to combining firms with Meritage, Joe founded Centennial Partners, LLC, a Memphis, Tennessee-based investment management firm where he was Chief Investment Officer and a member of the board of managers. Prior to Meritage and Centennial, Joe founded Alternative Investment Strategies, a firm focused on advising clients with hedge fund and CTA portfolios. Joe's extensive background in securities and alternative investments also includes serving as the President and Chief Investment Officer of 6800 Capital, a fund of funds sponsor and trading manager; manager of managed futures for Morgan Keegan and Co. and J.C. Bradford & Co., two regional brokerage firms; account executive at Thomson McKinnon; and vice president of Hancock & Harwell. Joe holds a BS from University of Alabama.

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