



Global tätige Hedgefondsmanager
hautnah – Investmentstrategien
und -ansätze, Insights, Erfahrungen
und vieles mehr.



Persönliche Einladung

12. FERI Hedgefonds Investmenttag 2023

– Hybrid-Veranstaltung –

Bad Homburg
Donnerstag, 14. September 2023

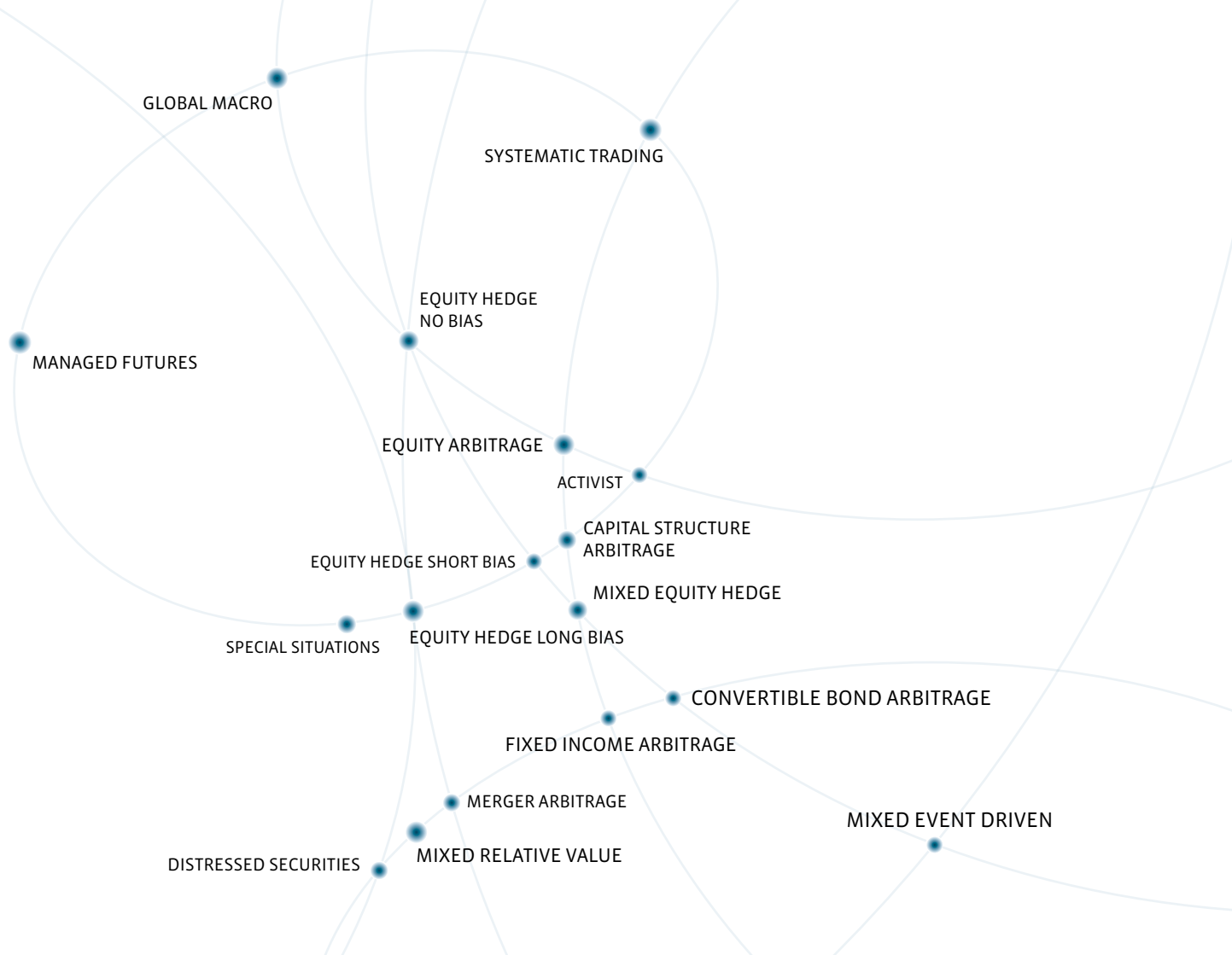
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Programm

09.30 Uhr	Anmeldung und Empfang mit Kaffee und leichtem Frühstück	12.00 Uhr	Mittagessen
10.00 Uhr	Empfang/Begrüßung Carsten Hermann, Bereichsvorstand Investment Management, FERI	13.00 Uhr	Interview – der heiße Stuhl Hedgefonds Solutions: Zusammenarbeit AIFM / Portfolio Manager Dr. Willi Müller, Head of Portfolio Management Union Investment Luxembourg S.A., Luxemburg Moderation: Uwe Lill, Geschäftsführer GFD – Gesellschaft für Finanzkommunikation mbH, Frankfurt
10.10 Uhr	Profitieren Hedgefonds vom gestiegenen Zinsumfeld? Marcus Storr, Head of Alternative Investments, FERI	13.20 Uhr	Kaffeepause
10.30 Uhr	The Opportunity Set for Investing in Digital Assets Gautam Sharma, CEO BH Digital Brevan Howard LLP, London	13.40 Uhr	Re-Emerging Markets? Antoine Estier, Founder & CIO Amia Capital LLP, London
11.15 Uhr	Opportunities in Global M&A Felix Lo, Portfolio Manager Trium Capital LLP, London	14.25 Uhr	Finding sustainable Return Sources with Carbon Emissions? Michael Azlen, Founder & CEO Carbon Cap Management LLP, London
		15.10 Uhr	Schlussbemerkung



Biographies

Michael Azlen

Michael Azlen has over 25 years' experience in investment management with 15+ years focused on alternatives. He founded Frontier Investment Management which grew to \$700m AuM and was acquired by a public asset manager. Previously he was Founder and CEO of Asset Alliance International, a \$4 bn+ alternative asset manager. Michael started his career as a proprietary trader at Scotia Bank and CIBC World Markets. Michael formed Carbon Cap Management LLP in 2018 as an environmental asset manager focused on climate change and launched the World Carbon Fund in February 2020. The fund invests into multiple liquid and regulated carbon markets and aims to generate strong uncorrelated returns and a direct impact on carbon emissions. He holds a BA in Management Economics from University of Guelph in Canada and the Sloan Masters Degree in Leadership and Strategy from London Business School. He has completed the executive education programme in climate change at the London School of Economics and is a CAIA Charterholder.



Antoine Estier

Antoine Estier is a Founding Partner of Amia Capital and the Chief Investment Officer for Amia Capital Macro Fund. Prior to Amia, he was a Founding and Managing Partner of BTG Pactual and a member of the Management Committee (2008-2016). Antoine was the Chief Investment Officer for the Global Emerging Markets and Macro Fund. Prior to BTG, he spent 16 years at UBS, where his roles included: Joint Head of UBS Fixed Income Emerging Markets division; Head of Emerging Markets in Europe, Middle East and Africa; and Head of Asian Fixed Income desk based in Singapore. While at UBS Antoine had global responsibility for all local and external debt trading, credit derivatives and structured products in Emerging Markets. Earlier in his career he was a foreign exchange and interest rates trader in Geneva. Antoine holds an Economics degree from the University of Geneva.



Felix Lo

Felix Lo has over 15 years' experience in global merger arbitrage and event driven investing. He joined Trium in April 2021, as Portfolio Manager, to launch the Trium Khartes Fund. Prior to this, Felix managed a global merger arbitrage & event portfolio at Millennium Capital Partners (Dec 2019 – Jun 2020), at LMR Partners (Apr 2018 – Dec 2019) and at Sandell Asset Management (Jun 2013 – Apr 2018). Before re-joining Sandell in 2013, Felix founded Granite Fund Advisors (Jan 2010 – May 2013), a Hong Kong based Hedge Fund, where he was the Co-Portfolio Manager for its equity event driven portfolio until the business was sold to a Chinese wealth management firm. Felix was previously a Senior Analyst at Sandell (Jan 2006 – Dec 2009). Felix graduated with a Bachelor of Science in Economics & a Bachelor of Science in Engineering, Magna Cum Laude, from the Wharton School & School of Engineering & Applied Science, University of Pennsylvania.



Biographies

Willi Müller

Willi Müller is head of portfolio management at Union Investment Luxembourg S.A. He has more than 25 years of experience in the investment fund industry with a special focus on fund management, set-up and cooperation with international fund managers in alternative assets covering especially private equity, infrastructure, hedge and debt funds. Willi joined Union Investment in 1998. Before this, he worked for WGG BANK Luxembourg S.A. and Deloitte Luxembourg. He was a visiting researcher at the Federal Reserve Bank in St. Louis and a professor at the Bank Academy in Frankfurt. Willi is a member of different ALFI and EFAMA working groups. He is fluent in German, English and French and holds a PhD in Economy as well as a qualification as a Financial Risk Manager from the Global Association of Risk Professionals.



Gautam Sharma

Gautam Sharma is CEO at Brevan Howard Digital, having previously led the principal investments team at Brevan Howard and worked with Alan Howard to oversee Alan Howard family office's investments and strategic businesses in crypto, Web 3.0 and digital assets. He has been instrumental in structuring and supporting Alan Howard's digital assets efforts across asset management, tech infrastructure opportunities and his family office investments. Prior to joining Brevan Howard in January 2021, Gautam worked as an operating partner for 5 years at Steadview Capital. Gautam also has 6 years of strategy consulting experience from his time as a Junior Partner at McKinsey & Co.'s London office. Gautam graduated from Indian Institute of Technology (IIT) with a degree in Chemical Engineering and holds a degree in Management (MBA equivalent) with a major in Finance from Indian School of Business.



Marcus Storr

Marcus Storr joined FERI in 2005. As Head of Alternative Investments and Member of the Management Committee at FERI he is responsible for the development of the Alternative Investment business (Hedge Funds, Private Equity and Risk Premia solutions) with total AuM of approx. €18bn. FERI's total group AuM are approx. €54bn. Additionally Marcus is member of the board of FERI Trust (Luxembourg) S.A., FERI's fund management company. He started his career in 1994 as an advisor to UHNWI before moving to London in 1998 joining the Investment Banking division of Robert Flemings Ltd. (acquired by JPMorgan). Until 2003 he was a Director within the Global Equities department of Dresdner Kleinwort Wasserstein in London. He has over 25 years of experience in Capital Markets, Corporate Transactions and Portfolio Management. Marcus holds a masters degree in Finance & Capital Markets and International Management & Economics from Humboldt University Berlin in addition to a two-year apprenticeship as a bank manager.



Über FERI

Die FERI Gruppe mit Hauptsitz in Bad Homburg wurde 1987 gegründet und hat sich zu einem der führenden Investmenthäuser im deutschsprachigen Raum entwickelt. Für Institutionelle Investoren, Familienvermögen und Stiftungen bietet FERI maßgeschneiderte Lösungen in den Geschäftsfeldern:

Investment Management ▪ Institutionelles Asset Management & Private Vermögensverwaltung

Investment Consulting ▪ Beratung Institutioneller Investoren & Family Office-Dienstleistungen

Investment Research ▪ Volkswirtschaftliche Prognosen & Asset Allocation-Analysen

Derzeit betreut FERI zusammen mit MLP ein Vermögen von ca. 54 Mrd. Euro, darunter rd. 18 Mrd. Euro Alternative Investments. FERI unterhält neben dem Hauptsitz in Bad Homburg weitere Standorte in Düsseldorf, Hamburg, München, Luxemburg, Wien und Zürich. Die proprietäre Hedgefondsexpertise wurde seit 1999 aufgebaut und stetig erweitert. Als diskretionärer Investment Manager investiert FERI dabei in klassische Offshore-Hedgefonds und in UCITS-Hedgefonds. Spezialisierte Hedgefondsstrategieanalysten ermöglichen unabhängige Entscheidungsprozesse in diesem researchintensiven Bereich. Neben den maßgeschneiderten Investmentlösungen gilt FERI auch als Pionier bei der Allokation und Konstruktion von passiven Hedgefonds-Index-Investitionen. FERI hat das größte Hedgefonds-Reseachteam in Deutschland aufgebaut und beschäftigt im Bereich Alternative Investments ca. 50 Personen.

Seien Sie unser Gast – live vor Ort bei uns in Bad Homburg oder online zugeschaltet von einem Platz Ihrer Wahl.

Ihr Kontakt zu FERI

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Anmeldung

Bitte geben Sie uns Ihre Rückmeldung bis zum 1. September 2023 – am einfachsten durch Scannen des QR-Codes oder über Frau Lisa Marie Wania. Wir freuen uns auf Ihre Teilnahme!

