

*Golden Networking*

Modern Finance Report

How Modern Finance is Impacting the Business World



# HEDGE FUNDS LEADERS FORUM 2013

NEW YORK CITY - LONDON - CHICAGO - SINGAPORE - FRANKFURT

GETTING READY TO MANAGE \$5 TRILLION BY 2016

## Information Package

# Hedge Funds Leaders Forum 2013



**HEDGE  
FUNDS**  
LEADERS FORUM 2013  
Getting Ready to Manage \$5 Trillion by 2016  
July 30  
**New York City**

**HEDGE  
FUNDS**  
LEADERS FORUM 2013  
Getting Ready to Manage \$5 Trillion by 2016  
October 8  
**Chicago**

**HEDGE  
FUNDS**  
LEADERS FORUM 2013  
Getting Ready to Manage \$5 Trillion by 2016  
September 18  
**London**

**HEDGE  
FUNDS**  
LEADERS FORUM 2013  
Getting Ready to Manage \$5 Trillion by 2016  
October 24  
**Singapore**

**HEDGE  
FUNDS**  
LEADERS FORUM 2013  
Getting Ready to Manage \$5 Trillion by 2016  
November 21  
**Frankfurt**



# Overview (I)



Global assets invested with hedge fund firms could rise from today's record \$2.1 trillion to more than \$5 trillion by 2016, according to a survey from Citi Prime Finance. The study found that pension funds, endowments, foundations and other institutional investors are increasingly embracing the risk management and diversification that hedge funds offer, and that hedge funds are developing new products that compete with traditional, long-only managers

Indeed, the potential for institutional investors to increase allocations to hedge fund strategies by \$1.0 trillion in order to better insulate against risk and to help ensure more diversified portfolios is there. Equally relevant, the survey revealed a "convergence zone," in which hedge funds and traditional asset managers will increasingly compete head-to-head to offer a broad set of equity and credit strategies. There could be an additional \$2.0 trillion in new allocations to hedge fund firms in the form of regulated alternatives and long-only products. Supporting this, mature hedge fund firms are leveraging their infrastructures and resources towards creating the offerings investors will demand

# Overview (II)



How can your firm take advantage of these structural trends impacting the alternative investments industry? How to successfully face the new post-crisis legal and regulatory challenges? How to manage the exploding data requests from investors and regulators? How to identify opportunities in frontier markets? Which other opportunities can be exploited to offer investors positive alpha at all times? Finally, how can you position yourself to capture the significant asset inflows in the next years?

Hundreds of the most important players in alternative investments in New York City, London, Chicago, Singapore and Frankfurt will gather for all-star agendas at [Hedge Funds Leaders Forum 2013](#), "Getting Ready to Manage \$5 Trillion by 2016". A virtual who's who will soon follow as one legendary manager after another will take the stage. Billions of investable assets will be represented by influential local and international investors who will listen with rapt attention as star managers and analysts discuss and debate the biggest issues facing the industry today



# Covering the Most Intriguing Topics Impacting the Hedge Funds



- ◆ Legal and Regulatory Issues in 2013: A Critical Year
- ◆ Exploding Data: Navigating the Storm
- ◆ The Next Frontier: Beyond Emerging Markets
- ◆ Post-Crisis Marketplace: Critical Operational Changes
- ◆ Global Opportunities: Blazing New Trail



# Legal and Regulatory Issues in 2013: A Critical Year



In the vigorously pro-regulation environment of the past couple of years, the job of the hedge fund manager has gotten even tougher. Not only is the job of delivering alpha an everyday challenge; monitoring new rules, performing due diligence and actively monitoring counterparties keeps managers busy at the best of times.

- How has Dodd-Frank changed the face of the hedge fund industry? What lies ahead regarding hedge fund regulation?
- What happens after SEC registration? Would it make sense to acquire a broker-dealer license?
- How better to monitor FATCA requirements? How administrators can help in the process?
- What should be now included in your firm's compliance and ethics policy?



# Exploding Data: Navigating the Storm



To satisfy investors and regulators, hedge funds are creating more and more data that must be efficiently managed and quickly accessible. Investors today expect rapid responses to questions making the ability to pull reports in real-time essential to operations.

- How hedge funds can overcome lack of training and knowledge of their own systems?
- How do your data management solutions stack up?
- How firms can effectively wrap procedures, controls, training and internal testing around hedge fund technology systems?





# The Next Frontier: Beyond Emerging Markets



Managers and investors have always expressed interest in emerging markets, so it comes as no surprise a similar interest in frontier markets in Latin America, Asia and Africa, where hedge funds are explore a variety of strategies that can be used to exploit them.

- Do return profiles of emerging markets justify the higher inherent risks?
- How to create market alpha rather than beta within emerging markets?
- Is the myth of global decoupling falling apart?



# Post-Crisis Marketplace: Critical Operational Changes



The alternative investment industry is rebounding from the black days of economic turmoil, but hedge funds are becoming smarter and thriftier. Budgets are still tight, and with increased demands from investors and regulators, funds now face greater challenges than ever before.

- How to reduce personnel and infrastructure cost and yet remain fully operational without sacrificing performance and efficiency?
- What operational changes can be made within your fund to reduce risk? How automation can be implemented at your firm?
- Should you increase the number of prime brokers you work with to reduce counterparty risk?



# Global Opportunities: Blazing New Trail



There is no lack of distressing news from Spain and London to Shanghai and Singapore. Yet, the best managers in the world are expected to produce returns in any environment.

- Where do the opportunities lie in the short and medium-term? How can investors capitalize on these opportunities?
- Which global markets present the most promising opportunities?
- Would wild market swings create opportunities for shrewd global macro hedge fund managers?
- What's the role of algorithmic and Hedge Funds in your toolkit?





# Executives Who Should Attend



Accountants  
Alternative Investments  
Analysts  
Asset Managers  
Automated Traders  
Chief Economists  
Chief Investment Officers  
Chief Operating Officers  
Chief Risk Officers  
Chief Technology Officers  
Developers  
Entrepreneurs  
Financial Advisors  
Financial Engineering  
Fund of Funds Managers  
Government Regulators  
Heads of Trading

Hedge Fund Managers  
High-Frequency Traders  
Institutional Investors  
Investment Professionals  
Legal Advisors  
Management Consultants  
Managing Partners  
Portfolio Managers  
Prime Brokers  
Project Managers  
Proprietary Traders  
Quality Directors  
Quantitative Traders  
Risk Managers  
Statistical Arbitrageurs  
Technology Providers  
Traders

# Extraordinary Media Coverage for Golden Networking's Leaders Forums



- ◆ The New York Times:
  - ◆ <http://dealbook.nytimes.com/2011/10/04/regulator-proposes-oversight-of-high-speed-traders/>
- ◆ Bloomberg:
  - ◆ <http://www.bloomberg.com/news/2011-10-04/sec-circuit-breakers-could-allow-market-disruption-chilton-says.html>
- ◆ The Wall Street Journal:
  - ◆ <http://online.wsj.com/article/BT-CO-20111004-712635.html>
- ◆ Forbes:
  - ◆ <http://www.forbes.com/sites/robertlenzner/2011/10/08/cheetah-traders-are-dangerously-controlling-our-markets>



# Partial List of Sponsors



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# Partial List of Media Partners





# Golden Networking



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## *Welcome*

GoldenNetworking.com is the premier networking community for businessmen, entrepreneurs, professionals and diplomats, to experience what's hot, new and next

Members are treated to exclusive industry-wide Business Receptions, Career Nights, Entrepreneur Networking Nights, Fashion Shows, Themed-Parties and Educational Seminars

Starting in the New York Metro area, GoldenNetworking.com is expanding its reach to San Francisco, Miami and London

Check pictures of the Asia Vision Foundation Benefit [here](#), co-hosted by GoldenNetworking.com's Founder Mr. Edgar Perez

Explore your Golden Concierge  
Meet the Golden Team  
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## *Upcoming Receptions*

GoldenNetworking.com invites you to these exciting Business Receptions and Forums, attended by successful businessmen, professionals, entrepreneurs and academics



### **Summer Career Night**

Date: Tuesday, August 11th, 2009

Time: 6:00PM to 9:00PM

Venue: Johnny Utah's (25 West 51st St., New York)

Click [here](#) to RSVP



### **China Leaders Forum 2009**

Date: Thursday October 8th, 2009

Time: 8:00AM - 7:00PM

New York City

Click [here](#) to RSVP



### **Middle East Leaders Forum 2009**

Date: Thursday October 29th, 2009

Time: 8:00AM - 7:00PM

New York City

Click [here](#) to RSVP

# Who Attends our Business Receptions and Forums?



- ◆ Financial Services executives, investors, professionals and entrepreneurs, interested in staying two steps ahead of their competition
- ◆ Breakdown of attendees by job title:
  - ◆ 28% C-Level
  - ◆ 22% Director - Managing Director level
  - ◆ 34% Vice President level
  - ◆ 15% Associate - Analyst - Intern level

# Company Representation at Receptions and Forums (I)



- ◆ Companies that were represented in previous Golden Networking receptions and forums:
  - ◆ Actualize Consulting, Algo Engineering, Alliance Bernstein, Arent Fox LLP, Avatar, AXA Advisors, Bank of America Merrill Lynch, Barclays Capital, BATS Global Markets, BlackRock, Blackstar Group, Bloomberg LP, BNP Paribas, BNY Mellon, Boston Consulting Group, Bradesco Securities, Brooklane Capital, Cassels & Graydon LLP, Charles Schwab, Chatsworth Group, Chimera Securities, Citigroup, Cleary Gottlieb LLP, Clifford Chance LLP, Columbia Business School, Corcoran Group Real Estate, Credit Suisse, Deutsche Bank, Direct Edge, Echartrade, Elk River Trading, Empire Capital Partners, ETF Venture Funds, ETR corp., Far Hills Group, Fortress Investment Group, GDR Privee, Gerson Lehrman Group, GilGantas LLC, GLC Trading Corp



# Company Representation at Receptions and Forums (II)



- ◆ Companies that were represented in previous Golden Networking receptions and forums:
  - ◆ Goldman Sachs, Green Arrow Partners, Guggenheim Securities, Hampton Asset Management, Harma Risk Management LLC, Harvard University, HedgeCo LLC, HSBC, HyPerform Group, iEpsilon, IO-Works Inc., IQ Venture Partners, Jane Street Capital, Koshdan Capital, Lenox Advisors, Lightyear Capital, Lime Brokerage, Liquidnet, Madison Trading, MBL Financial Group, McClendon, McKinsey & Co., Medvice, Meridian Equity Partners, MetLife, MF Global Investment Management, Moody's Investors Service, Morgan Stanley, Morrison & Partners, Natexis Private Equity Asia, Natixis Capital Markets, Needham Partners, Newedge, Newport Private Investments, Nixon Peabody LLP, Nomura Research, NP Solutions, NY Federal Reserve, PCP Financial Partners, Penn Mutual

# Company Representation at Receptions and Forums (III)



- ◆ Companies that were represented in previous Golden Networking receptions and forums:
  - ◆ Prestige Financial, Privet Capital, ProCapital, Protrade Securities, Prudential Douglas Elliman, Prudential Securities, Quantix, RBC Capital Markets, RBC Wealth Management, Real Time Partners LLC., Reuters, RM Capital, Roland Berger, Rutgers University, RZB Finance LLC, Schonfeld Securities, Securities Industry News, SMB Capital, Solomon Daniels Global Economics LLC, Standard and Poor's, Stepwise Capital, Stern School of Business, Strategies For Wealth, Synchronon, Systematic Alpha Management, Systematic Strategies LLC, Thomson Reuters, TIAA-CREF, Timber Hill LLC, Travers and Associates, TSIX Trading, Two Sigma Investments, UBS, Unilogic, Universal Data Interface, University of Michigan, VisCap, Volant Trading, Wall Street Legal Consulting PLLC, Westbrook Capital, Winston Capital Management, WJ. Dowd, WTS Proprietary Trading Group

# Testimonials



“Thank you for inviting me to participate at the conference! Great event!  
Let's keep in touch!”

Ira Perlmutter, Managing Partner, T5 Equity Partners

“Thanks again for having me on the panel. I really enjoyed it and would  
love to do more of them in the future. Lets keep in touch.”

Matthew Baron, Principal, Simon Development Group

“Really enjoyed it. Congratulations on a great conference! Thanks  
again.”

Debashis Bhattacharya, Portfolio Manager, Fortis Investments

“I enjoyed participating in the conference and thought it was very  
successful.”

Scott Eisenberg, Managing Partner, Amherst Partners

“I thought the panelists were excellent and it was a great program. I look  
forward to the next one.”

Neil Axler, Vice President, FMV Opinions





# More Information



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