100 women in hedge funds®

Education Session No. 336:
Incorporating Commodities and Currencies in Portfolios: A Global Fund Managers Roundtable

June 19, 2012 at 6 PM
San Francisco, CA

Risk diversification and value enhancement are two primary reasons investment managers consider other asset classes. The markets and securities of commodities, commodities stocks and currency investments have many attractive features that merit their inclusion in the traditional stock and bond investment portfolio.

Guided by our panelists, we will take a closer look at the outlook, drivers and investment strategies for currency, commodity and commodity stocks, and consider:

- How do commodities, commodities stocks and currencies fit in as an asset class and what are the relevant benchmarks?
- How do the sovereign debt crisis, macro and geo-political factors and institutional flows affect the near-term outlook?
- What is the long-term expected return for these assets?
- Which way are the dollar, gold and inflation headed?

Participants

Jeffrey Baird, Moore Capital Management
Teresa Kong, Matthews Asia
Roger Mortimer, Parador Asset Management
Marianne O, ***Moderator***, Lumen Advisors, LLC

Event Details

Date: June 19, 2012
Time: 5 PM Registration.
We will begin *promptly* at 6 PM; please arrive early. Since it is disruptive to everyone when latecomers enter the session, those arriving after an education session has begun will only be admitted at the discretion of 100WHF and the host.
Please note the start time on this invite and plan to arrive early.
Networking and cocktails prior to session.
Hosts: Burr Pilger Mayer and Matthews Asia
Location: Embarcadero Conference Center
4 Embarcadero Center, Promenade Level, **San Francisco**, CA 94111
RSVP: RSVP Now

If you have any questions about this event, please contact the California, North committee.

This event is NOT FOR ATTRIBUTION.

Admission is free, but there is a $25 charge if you register and do not attend, even if you cancel in advance. No-show proceeds will be donated to DonorsChoose.org, the 2012 beneficiary of 100WHF's US philanthropic initiatives.

If you have no-show fees in arrears, the system cannot register you for an event. You can view and pay for any outstanding no-show fees online from your Member Profile

Space is limited. No walk-ins will be permitted.

Biographies

Jeffrey Baird, Portfolio Manager, Moore Capital Management
Jeffrey Baird is currently a Portfolio Manager at Moore Capital Management where he overseas an investment portfolio focused on commodity and natural resource markets. Prior to joining Moore in 2007, Jeff was a co-Portfolio Manager at Caxton LLC. Before Caxton, Jeff held trading and managerial positions focused on energy and metals markets at ABN Amro, Merrill Lynch, and Deutsche Bank. Jeff has a B.A. in Mechanical Engineering from Stanford University. He currently lives with his wife and daughters in Berkeley, California.

Teresa Kong, Portfolio Manager, Matthews Asia
Teresa Kong is a Portfolio Manager at Matthews International Capital Management, LLC and manages the firm's Asia Strategic Income strategy. Prior to joining Matthews in 2010, she was Head of Emerging Market Investments at Barclays Global Investors, now known as BlackRock, and responsible for managing the firm's investment strategies in Emerging Asia, Eastern Europe, Africa and Latin America. She developed and managed strategies spanning absolute return, active long-only and exchange-traded funds. In addition to founding the Fixed Income Emerging Markets Group at BlackRock, she was also Senior Portfolio Manager and Credit Strategist on the Fixed Income credit team. Previously, Teresa was a Senior Securities Analyst in the High Yield Group with Oppenheimer Funds, and began her career with JP Morgan Securities Inc., where she worked in the Structured Products Group and Latin America Capital Markets Group. She received both a B.A. in Economics and Political Science and an M.A. in International Development Policies from Stanford University. She speaks Cantonese fluently and is conversational in Mandarin.

Roger Mortimer, Founder & Chief Investment Officer, Parador Asset Management
Roger J. Mortimer is the Founder and Chief Investment Officer of Parador Asset Management, a San Francisco based firm focused on investing in Canada as a secular theme. Roger is the portfolio manager for Mackenzie Universal Canadian Shield Fund. Prior to Parador, he spent 12 years managing Canadian and global mandates for AIM Investments, Global Partner - AMVESCAP and Capital Guardian Trust Company. Mr. Mortimer earned an M.B.A. from the Richard Ivey School of Business Administration, University of Western Ontario and a B.A. in economics from Huron College, University of Western Ontario.

Marianne O, Co-Founder & Portfolio Manager, Lumen Advisors, LLC
Marianne O co-founded San Francisco-based Lumen Advisors in 2002 where she is a Principal and Portfolio Manager. Marianne has over seventeen years of experience in investing in emerging markets in multiple asset classes. Prior to Lumen, she has been the Assistant Director and fixed income analyst for emerging markets debt, sovereign and corporate at Dresdner RCM Global Investors. Prior to joining DRCM, she was working at Tradewinds Financial Corporation as an emerging market analyst. Previously, Marianne worked with Simon Nocera at LGT as part of the team responsible for sovereign, currency and corporate investments in emerging markets. Before joining LGT, Marianne was an Assistant Vice President at Citicorp International Limited in Hong Kong where she was involved in loan origination and syndication in Asian capital markets. Marianne holds a M.B.A. in Finance from the University of California, Berkeley, a Masters of Arts Degree and a Bachelor of Arts in Economics (HONS) from the University of Cambridge in England and is a Chartered Financial Analyst. She speaks Cantonese and Mandarin.

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About Burr Pilger Mayer
Burr Pilger Mayer (BPM) is the largest California-based accounting and consulting firm, serving the Bay Area's emerging and mid-cap businesses as well as high net worth individuals for 25 years. A full-service accounting and consulting firm, BPM is deeply experienced in assurance, tax, business consulting, and wealth management, led by over 50 committed partners. BPM's industry experience covers many sectors including technology (semiconductor, software, hardware, Internet/online media), life sciences, financial services and nonprofit. The firm's Financial Services Industry Group possesses in-depth knowledge of regulatory compliance, accounting and financial reporting issues and we help our clients such as hedge funds, private-equity funds, VC funds, broker-dealers, investment banks and registered investment advisors navigate through these issues. With one of the largest international tax teams in the Bay Area, our clients are located as far away as China and India and as nearby as Mexico. BPM is a member of the Leading Edge Alliance, a prestigious international association of independently owned accounting firms.

Matthews Asia®

About Matthews Asia
At Matthews, we believe in the long-term growth of Asia. Since 1991, we have concentrated our efforts and expertise within the region. As an independent, privately owned firm, Matthews is the largest dedicated Asia investment specialist in the United States. Our investment offerings provide a broad range of strategies for building a global portfolio that includes exposure to one of the world's fastest-growing regions.

About 100 Women in Hedge Funds (www.100womeninhedgefunds.org)
100 Women in Hedge Funds is a global, practitioner-driven non-profit organization serving over 10,000 alternative investment management investors and professionals through educational, professional leverage and philanthropic initiatives. Formed in 2001, 100 Women in Hedge Funds has hosted more than 300 events globally, connected more than 250 senior women through Peer Advisory Groups and raised over $25 million for philanthropic causes in the areas of women's and family health, education and mentoring.