Making it Big: Lessons from High-Growth Hedge Funds

July 10, 2013 at 6 PM
New York

When the big get even bigger, how do others achieve growth? Hedge fund managers with more than $5 billion in assets now control approximately two-thirds of hedge fund industry assets, up from just over half since the financial crisis in 2008. With a higher concentration of fewer, larger players, not to mention market headwinds, how can you best position your platform to capture net hedge fund flows? What are the best strategies for growing a hedge fund business in an ever more competitive market?

Managers who have attained growth will share lessons learned from different angles:

- What are the approaches available to implement a growth strategy?
- What are the success factors critical to a growth strategy?
- How does your business model impact which avenues for growth may be achievable?

Participants

JK Brown, Och-Ziff
Sandra Myburgh, Barclays
John Novogratz, Millennium Management LLC
Aaron Yeary, Pine River Capital Management
Anurag Bhardwaj, ***Moderator***, Barclays

Event Details

Date: July 10, 2013
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 will follow.
Host: Barclays
Location: 745 7th Avenue (between 49th and 50th Street), ASK Auditorium, **New York**, NY 10019
RSVP: RSVP Now

If you have any questions about this event, please contact the New York Education committee.

This event is NOT FOR ATTRIBUTION. All 100WHF events are private events and we require that no one reports publicly on any aspect of them.

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 Best Buddies, the 2013 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

JK Brown, Head of Global Investor Relations, Och-Ziff
James-Keith ("JK") Brown is Head of Global Investor Relations for Och-Ziff and is a member of Och-Ziff's Partner Management Committee. Mr. Brown is also an Executive Managing Director. Prior to joining Och-Ziff in 2003, Mr. Brown spent more than four years at Goldman, Sachs & Co. where he was a Managing Director and Head of U.S. Institutional Sales and Relationship Management. He began his career at J.P. Morgan, followed by a position at Dartmouth College. Mr. Brown then moved to Bankers Trust, where he was a Managing Director. Mr. Brown holds a B.A. from the University of North Carolina at Chapel Hill.

Sandra Myburgh, Director, Manager Research for the Wealth and Investment Management Division, Barclays
Sandra Myburgh is a Director in Manager Research for the Wealth and Investment Management division of Barclays. Based in New York, Ms. Myburgh leads the Investment Due Diligence team that recommends Hedge Funds to Barclays clients. She advises investors on tactical asset allocations for Alternatives and is part of the Americas Investment Committee.

Ms. Myburgh joined Barclays in February 2009. Previously, she worked for Barclays Global Investors where she acted as Principal for the Fund of Hedge Funds group. She also worked at ABN AMRO in New York and Standard Chartered Bank in both New York and Singapore, focusing on interest rate derivatives, credit and currency derivatives trading and structuring in Emerging Markets. Ms. Myburgh began her career as a Currency Option Trader at Rand Merchant Bank in Johannesburg, South Africa.

A FINRA registered investment advisor (Series 7, Series 63), Ms. Myburgh holds a Masters Degree in Economics (summa cum laude) from the University of Johannesburg. She is also an avid fundraiser for HIV projects in Africa and Asia and has trekked to Mount Everest base camp to raise money for this cause.

John Novogratz, Global Head of Marketing, Investor Relations and Product Development, Millennium Management LLC
Mr. Novogratz is responsible for managing the Marketing and Investor Relations Department, with a primary focus on building and developing new and current investor relationships for Millennium. Mr. Novogratz worked at Fortress Investment Group for almost six years before joining Millennium, most recently as Managing Director and Head of Capital Formation International in London. He was successful in building out Fortress' presence and establishing strong partnerships in Europe, the Middle East, and Asia, as well as North America. Prior to joining Fortress, he held various positions at Applied Development, Scient and Goldman Sachs Asset Management. He graduated from the College of William & Mary with a BA in Economics. Mr. Novogratz is on various boards including Beat the Streets and is a trustee for the Foundation Board for the College of William and Mary.

Aaron Yeary, Portfolio Manager and Partner, Pine River Capital Management
Aaron Yeary is a Partner of Pine River Capital Management and has been involved with the development and portfolio management of multiple strategy areas since the firm's inception in 2002. He is the Portfolio Manager for Pine River's global multi-strategy product, the Pine River Fund. Aaron is the Head of Pine River's New York office, where the firm's largest trading desk resides. Prior to joining Pine River, Aaron was an arbitrage trader with EBF & Associates in Minnetonka, MN. He holds a Bachelor of Arts degree in Economics from the University of Chicago.

Anurag Bhardwaj, Head of Strategic Consulting, Barclays
Anurag Bhardwaj is the global head of the Strategic Consulting team within Barclays Prime Services, and is based in New York. Anurag joined the team from Barclays Strategy and Planning group, where he worked closely with senior business leaders on strategic issues facing the firm. Prior to joining Barclays, Anurag was a Senior Vice President in Corporate Strategy at Lehman Brothers where, among other projects, he led the successful spin-outs of two hedge funds (R3 Capital and One William Street). Anurag joined Lehman Brothers from McKinsey & Company where he was a Senior Engagement Manager. Before going to business school, Anurag was an FX Trader at American Express Bank and ANZ Bank. Anurag holds an MBA degree from The Wharton School with concentrations in Finance and Strategic Management, a B. Tech in Electrical Engineering from NIT India, and is a CFA charter holder since 2005.

About Barclays
Barclays is a major global financial services provider engaged in personal banking, credit cards, corporate and investment banking and wealth and investment management with an extensive international presence in Europe, the Americas, Africa and Asia. Barclays' purpose is to help people achieve their ambitions - in the right way.

With over 300 years of history and expertise in banking, Barclays operates in over 50 countries and employs approximately 140,000 people. Barclays moves, lends, invests and protects money for customers and clients worldwide. For further information about Barclays, please visit our website www.barclays.com.

About 100 Women in Hedge Funds (www.100womeninhedgefunds.org)
100 Women in Hedge Funds is a global, practitioner-driven non-profit organization serving over 12,000 alternative investment management investors and professionals through educational, professional leverage and philanthropic initiatives. Formed in 2001, 100 Women in Hedge Funds has hosted close to 400 events globally, connected more than 250 senior women through Peer Advisory Groups and raised nearly $30 million for philanthropic causes in the areas of women's health, education and mentoring.