100 women in hedge funds®

The Current State of the Credit Markets: Opportunities in this Low Return Environment

October 23, 2014 at 5:30 PM
Boston, MA

As traditional fixed income has run its course, a key question remains: How can we generate strong risk/adjusted returns in a low rate environment? Join us in an interactive and forward-looking discussion on the credit markets. As we continue to navigate a challenging environment, let's explore the opportunity set and discuss how hedge funds can play a more prominent role as credit providers.

Participants

Viva Hyatt, Sankaty Advisors
Barbara McKenna, CFA, Longfellow Investment Management Co.
Sarah Thompson, CFA, Blackrock
John O'Connor, ***Moderator,*** Battery Global Advisors

Event Details

Date: October 23, 2014
Time: 5 PM Registration.
We will begin *promptly* at 5:30 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: Grant Thornton LLP
Location: 75 State Street, 13th Floor, **Boston**, MA 02109
RSVP: RSVP Now

If you have any questions about this event, please contact the Boston 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 Cerebral Palsy International Research Foundation, the 2014 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

Viva Hyatt, Managing Director and Co-Head of Industry Research, Sankaty Advisors
Viva Hyatt is a Managing Director at Sankaty Advisors and Co-Head of Industry Research. She joined Sankaty in 2002 and currently focuses on investments in the Housing, Packaging, and Industrial sectors. Previously, Ms. Hyatt worked at The Boston Consulting Group where she primarily worked with Industrial companies. Ms. Hyatt received an M.B.A. from The Wharton School at the University of Pennsylvania and a B.S. in Accounting with Highest Honors from the University of Illinois at Urbana-Champaign. Ms. Hyatt is a Certified Public Accountant.

Barbara McKenna, CFA, Managing Principal and Portfolio Manager, Longfellow Investment Management Co.
Barbara McKenna is Managing Principal and Portfolio Manager at Longfellow Investment Management Co. (LIM), an independent, 100% employee owned firm with approximately $6.5 billion in AUM, specializing in customized fixed income and alternative investment strategies for a diverse institutional clientele. Barbara leads Intermediate and Core portfolio management and heads credit strategy. Prior to joining LIM in 2005, she was a Director and Senior Portfolio Manager at State Street Research (SSR), for $14 billion of institutional fixed income accounts. As Director of Corporate Bond Strategy, she was responsible for the development and implementation of corporate bond strategy across all fixed income mandates. Prior to joining SSR, Barbara was a Director and portfolio manager at Standish, Ayer & Wood. She has also held portfolio management and investment banking positions at BayBank and Massachusetts Capital Resource Company, a private capital firm. Barbara has over 25 years of experience and holds a MS and BS in Finance from Boston College. Barbara is a CFA charterholder, a member of the CFA Institute and a member of the Boston Security Analysts Society. She is a Board Trustee of the American Beacon Funds.

Sarah Thompson, CFA, Managing Director and Head of US Fundamental Credit Research, Blackrock
Sarah Thompson, CFA, Managing Director, is a member of Americas Fixed Income within Alpha Strategies. She is head of US Fundamental Credit Research. Prior to joining BlackRock in 2013, Mrs. Thompson was a Managing Director at Barclays heading the US Distressed Desk Analyst Group. Prior to joining Barclays in September 2008, Mrs. Thompson headed the Industrials pod for High Grade and High Yield Research at Lehman Brothers. Mrs. Thompson joined Lehman Brothers in 1999 covering high yield manufacturing, services and automotive sectors. Prior to joining Lehman Brothers, she covered similar industries for CIBC World Markets, which she joined in 1996 after working in the mortgage consulting group at KPMG Peat Marwick.

Mrs. Thompson has been ranked first place by Institutional Investor in Manufacturing/General Industrials for 2007, 2003, 2002 and 2001, second place by Institutional Investor in Manufacturing/General Industrials for 2008 and 2004, and third place by Institutional Investor in Manufacturing/General Industrials for 2006 and 2005; and second place by Institutional Investor in Services for 2004, 2003 and 2002, third place by Institutional Investor in Services for 2007, 2005 and 2001, and Runner-up by Institutional Investor in Services for 2006.

Mrs. Thompson graduated from Georgetown University with a major in accounting. She also completed the Certified Public Accountant exam.

John O'Connor, Chief Investment Officer & CEO, Battery Global Advisors
John O'Connor joined Battery Ventures in 2001 to start and manage an internal family office, which spun out into an independent investment advisor (Battery Global Advisors) in 2011. BGA currently advises on over $650mm in liquid assets plus its clients' illiquid investments in real estate, private equity and concentrated business interests.

As CIO, John is responsible for the firm's three main investment strategies: opportunistic growth, uncorrelated absolute return, and preservation of capital / income in excess of inflation. Since 2009, John has managed the preservation of capital strategy in a private fund format, investing in a diverse set of fixed income and other yield-based products via direct investments, index products, active mutual funds, separately managed accounts, derivatives, and other strategies.

Prior to joining Battery Global Advisors, John was a Vice President with the Boston-based financial consulting firm RINET Company, Inc. From 1991 through 1997, John held several positions at the regional CPA firm Rooney, Plotkin & Willey (since acquired), most recently as a manager. John has a BS in Accounting from Bryant University and is a licensed CPA. He is also a member of the American Institute of Certified Public Accountants and is on the board of trustees for Family Service of Greater Boston.

Grant Thornton

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Grant Thornton LLP (Grant Thornton) is the U.S. member firm of Grant Thornton International Ltd, one of the world's leading organizations of independent audit, tax and advisory firms. Grant Thornton has revenue in excess of $1.3 billion and operates 57 offices across the United States with more than 500 partners and 6,000 employees.

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 over 450 industry education events globally, connected more than 250 senior women through Peer Advisory Groups and raised over $33 million for philanthropic causes in the areas of women's and family health, education and mentoring.