Education Session No. 597:
Portfolio Manager Panel: Opportunities and Risks in the Global Markets

December 3, 2015 at 6 PM
Stamford, CT

2016 world economy looks stronger than 2015 but "a return to robust and synchronized global expansion remains elusive," the IMF said in its October outlook. The unpredictable changes in the global economy have continued to heighten levels of market volatility. What are the key factors for investors to evaluate for near-term and long-term return prospects?

Our investment management panelists will share their diversified views on current opportunities and risks across global markets as we begin the 2016 outlook. Following the panel, network with friends and colleagues as we approach the holiday season and end of a memorable year.

Participants

Nili Gilbert, CFA, CAIA, Matarin Capital
Ulrike Hoffmann-Burchardi, Tudor Investments
Michelle Kelner, Sandglass Capital Management
Ellen Schubert, ***Moderator***, Markit

Event Details

Date: December 3, 2015
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: Grant Thornton
Location: UCONN
1 University Place, **Stamford**, CT 06901
RSVP: RSVP Now

If you have any questions about this event, please contact the Connecticut 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 100WHF Foundation - Celebrating Education/Investing in the Next Generation initiative, the 2015 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

Nili Gilbert, CFA, CAIA, Co-Founder and Portfolio Manager, Matarin Capital
Nili Gilbert is Co-Founder and Portfolio Manager of Matarin Capital, with responsibility for hedge fund and long-only equity strategies. Since the firm's inception, Matarin has been recognized as a performance leader by PSN and by eVestment Alliance/Emerging Manager Monthly, and as a thought leader, with its research cited in such prestigious publications as The Wall Street Journal and Barron's and on CNBC. In 2011, Matarin was a proud inaugural winner of the Toigo Foundation's Bridge to Business award.

Prior to founding Matarin, Nili was Senior Director and Senior Research Analyst at Invesco, working in both New York City and Frankfurt, Germany, with responsibility for development of the firm's global multi-asset models. Additional experience includes roles at Morgan Stanley and the Synergos Institute.

Nili received her BA from Harvard University, graduating magna cum laude in a Special Concentration in Economics and Social Studies, and her MBA in Finance from Columbia University, where she was a Toigo Fellow. Nili is both a CFA and CAIA Charterholder, and was honored by 100 Women in Hedge Funds as a 2013 Chartered Alternative Investment Analyst Scholar.

She is a Board Member of Synergos Institute, and Chairwoman of the Board's Finance and Investment Committees. She also serves on the Council on Foreign Relations' International Affairs Selection Committee as well as its Term Member Advisory Council. She is a member of the Economic Club of New York, and on the Advisory Council of Winning Play$, which provides financial literacy education.

Nili speaks both German and French with great proficiency, and enjoys mentoring, travel, and fitness.

Ulrike Hoffmann-Burchardi, Managing Director, Portfolio Manager Global Equities, Tudor Investments
Ulrike Hoffmann-Burchardi is a Partner and Portfolio Manager at Tudor Investment where she oversees a global equity portfolio. She joined Tudor Investment in 1999 as a macro-economic researcher in the firm's Quantitative Trading team before she transitioned to portfolio management in public equities in 2002. Since 2009 she oversees a global public equity portfolio inside Tudor's BVI fund.

Ulrike holds a Masters degree in Finance from the University of St. Gallen in Switzerland (1995) where she graduated first in her class and a PhD in Finance from the London School of Economics and Political Science (2000). At the London School of Economics she was a member of the school's Financial Markets Group and published on the topics of corporate governance, shareholder rights and financial markets. She resides in New York City with her husband and four daughters.

Michelle Kelner, Co-Founder, Sandglass Capital Management
Michelle Kelner is the co-founder of Sandglass Capital Management and serves as a key member of the firm's three person investment team. She is responsible for generating and researching stressed and distressed credit, and event driven equity ideas for the firm's global emerging and frontier markets strategy.

Ms. Kelner was previously a Senior Partner and Portfolio Strategist with Prince Street Capital, a New York and Singapore based investment firm that specializes in emerging and frontier markets. At Prince Street, Ms. Kelner was a senior member of the firm's investment team responsible for researching equity and credit ideas and served on the firm's investment committee. She also led the firm's business development effort. Before joining Prince Street, Ms. Kelner spent 15 years in emerging markets as a portfolio manager and trader at hedge funds SAC Capital, Tudor Investment in New York, and Hermitage Capital in Moscow. She also spent six years as an investment banker focused on Russia and the former Soviet Union, at Unicredit in New York and UralSib Capital in Moscow. Ms. Kelner graduated with honors in finance and economics from the McIntire School of Commerce at the University of Virginia. She was born in Russia and speaks the language fluently.

Ellen Schubert, Senior Strategist, Markit Partners
Ellen is currently working as a Consultant for Markit Partners designing and implementing a "Go To Market" strategy for a new joint venture with 3 large multinational banks and Dell Cloud services around third party due diligence and incident notification and tracking. She spent the last year consulting to women-owned hedge funds, both start-ups and established funds on various aspects of their marketing, human resources and compliance policies.

Ellen spent 2009-2014 as Chief Advisor to Deloitte's Asset Management Services group, advising hedge fund clients on issues including operations, product structuring, and regulation. Prior to joining Deloitte, Ellen was a Managing Director and Global Head of the Fixed Income Hedge Fund Business for UBS where she served on the Investment Bank Board of Directors since 2005. She began her career at the Chicago Board of Trade. Additionally, Ellen has served as a member of Foreign Exchange Committee and Co-Chair of the Operations Managers Working Group of The Federal Reserve Bank of New York.

Ellen currently serves as a Director and Treasurer on Miami University's Foundation Board and is a Member of the Finance Advisory Board of Miami University's Farmer School of Business. She is also a Board Member of Power My Learning, a national nonprofit that helps low-income students harness the power of digital learning to improve educational outcomes. She has served on the Investment Committee of the Junior Achievement Board of SW Connecticut since 1999.

Ellen was honored with the Merit Award from the Women's Bond Club of New York in 2004 and she received the Leadership Award from 100 Women in Hedge Funds in 2005. She currently resides in Greenwich Connecticut with her husband and five sons.

About Grant Thornton
Founded in Chicago in 1924, 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.

Grant Thornton works with a broad range of publicly and privately held companies, government agencies, financial institutions, and civic and religious organizations. Core industries served include consumer and industrial products, financial services, not-for-profit, private equity, and technology. Grant Thornton focuses on serving dynamic organizations that pursue growth holistically - whether through revenue improvement, leadership, mission fulfillment, or innovation.

Grant Thornton supports the kinds of policies that allow these companies to reach their full potential and is particularly qualified to serve clients in the middle market that face the challenges of growth and expansion. By fostering responsible entrepreneurship, Grant Thornton helps these organizations grow and fuel a thriving economy.

100 women in hedge funds®

About 100 Women in Hedge Funds (www.100womeninhedgefunds.org)
100 Women in Hedge Funds is a global, practitioner-driven non-profit organization serving over 13,000 alternative investment management investors and professionals in 20 locations through educational, professional leverage and philanthropic initiatives. Formed in 2001, 100 Women in Hedge Funds has hosted over 500 industry education events globally, connected more than 350 senior women through Peer Advisory Groups and raised over $38 million for philanthropic causes in the areas of women's and family health, education and mentoring.