

NextGen AI Powered Funds Forum



NextGen Alpha



NextGen AI Powered Funds Forum – November 15, 2022
Taunusanlage 8, 60329 Frankfurt am Main, Germany
Organized by NextGen Alpha

Future trend of investment decision making powered by artificial intelligence has arrived

NextGen Alpha is pleased to announce the NextGen AI Powered Funds Forum will be held November 15, 2022 at the offices of Linklaters LLP, Taunusanlage 8, 60329, Frankfurt am Main, Germany.

Consistent with previous NextGen AI events dating back to 2017, the mission for the upcoming AI Funds Forum is to provide guests with a comprehensive overview of the AI powered investment management industry.

The full day, in-person plus global live stream attendance connects investors with a multi-national speaker line-up comprised of fund managers who offer a diversified range of AI powered strategies, styles and asset classes:

Crypto Arbitrage, ESG, Multi-Asset, Equities, Value, Multi-Strat, Balanced

For guests who attend in person the forum offers a highly interactive and engaging event experience as well as an efficient cost effective forum for investors to conduct AI fund research and select from a range of AI powered investment opportunities.

At the end of the day, forum guests will have been exposed to the landscape of practical artificial intelligence implementation experiences offered by AI innovators who are transforming the investment management industry. **No noise just reality!**

Registration is required: <https://ai.hamburg/nextgen-ai-powered-funds-forum/>

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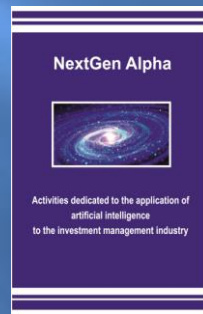
fred.sage@nextgen-alpha.com

Event Moderators: Fred Sage and Debjit D. Chaudhuri

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Program Overview

Program Schedule (Subject to change)

10:00 - 18:00 CET (includes presentations, Q&A and breaks)

18:00 - 19:00 Networking drinks get together

Welcome: **Debjit D. Chaudhuri**, Frankfurt Business Ambassador to India

Keynote speaker: **Dr. Hendrik Leber**, ACATIS Investment, Speaker of the Management Board

State of the AI fund universe: **Fred Sage**, Chairman, NextGen Alpha

Welcome by Linklaters: **Mario Pofahl**, Partner, Linklaters LLP, Hamburg

Line-Up of Speakers and AI Powered Strategies (Subject to change)

| Company | Speaker | Strategy/Asset Classes/Topic |
|-------------------|---|--|
| ACATIS Investment | Dr. Eric Endress, Head of Quantitative Research | U.S. Equities /Value |
| Othoz Capital | Julien Florian Jensen, Executive Director Dr. Daniel Willman, Managing Partner | Balanced |
| Tungsten Capital | Michael Guenther, Portfolio Manager | Multi-Asset |
| Sparkasse Bremen | Dr. Sascha Otto, Head of Securities and Portfolio Management | Smavesto AI powered customized portfolios/ Multi-Asset |

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|---------------------|--|---|
| Sanlam GIS | David Itzkovits, CEO | Balanced |
| Valid Alpha | Hugo Langeen, Co-founder | Crypto Arbitrage |
| Al. Fund | Petra Vorsteher and Ragnar Kruse Co-Founders | Investing in European Early Stage AI companies |
| Green Blue Invest | Dr. Pascal Botteron, CEO | Equities/ ESG |
| Antea AG | Johannes Hirsch, Managing Director | AI enhanced/ Multi-Asset |
| Kvasir Technologies | Mike-Merritt Holmes, Co-Founder | Equity Market Neutral |
| Berenberg | Nico Baum, Head of Innovation and Data Sebastian Hermanns, Innovation and Data-Senior Data Scientist | Global Macro/Sentiment |

Program Schedule

10:00-10:15

Welcome and event overview

- **Debjit D. Chaudhuri**, Frankfurt Business Ambassador to India
- **Fred Sage**, Chairman, NextGen Alpha

10:15-10:30

Welcome on behalf of Linklaters

- **Mario Pofahl**, Partner, Linklaters, Hamburg

10:30-11:00

Keynote presentation

- **Dr. Hendrik Leber**, ACATIS Investment, Speaker of the Management Board

11:00-11:30

Al. Fund

- **Petra Vorsteher and Ragnar Kruse**, Co-Founders

11:30-12:00

Sparkasse Bremen

- **Dr. Sascha Otto**, Head of Securities and Portfolio Management

12:00-12:30

Green Blue Invest

- **Dr. Pascal Botteron**, CEO

12:30-13:30 Networking Lunch Break

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13:30-14:00

Tungsten Capital

- **Michael Guenther**, Portfolio Manager

14:00-14:30

Sanlam GIS

- **David Itzkovits**, CEO

14:30-15:00

ACATIS Investment

- **Dr. Eric Endress**, Head of Quantitative Research

15:00-15:30

Antea AG

- **Johannes Hirsch**, Managing Director

15:30-16:00 Networking Coffee Break

16:00-16:30

Othoz Capital

- **Julien Florian Jensen**, Executive Director
- **Dr. Daniel Willman**, Managing Partner

16:30-17:00

Valid Alpha

- **Hugo Langeen**, Co-founder

17:00-17:30

Kvasir Technologies

- **Mike-Merritt Holmes**, Co-Founder

17:30-18:00

Berenberg

- **Nico Baum**, Head of Innovation and Data
- **Sebastian Hermanns**, Innovation and Data-Senior Data Scientist

Summing up the day

18:00-19:00 – Networking drinks get together

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Speaker biographies (Alphabetical order)

Nico Baum - Berenberg

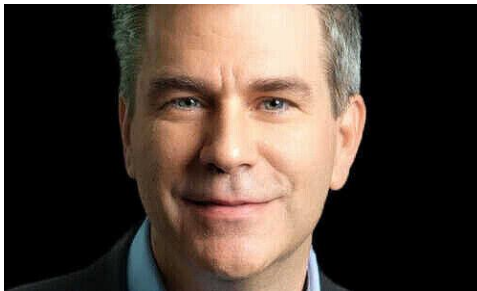


Nico Baum joined Berenberg in 2018. Besides heading the Business Management & Development department within the Asset Management platform, Nico is also the Head of Innovation & Data. The team has a focus on research, new technologies and is working on improving our platform using these new technology & approaches. Furthermore the team is managing several FX mandates for European clients and a public AI based investment fund in Germany.

Previously, Nico worked as chief operating officer and portfolio manager in an asset manager/fintech with a focus on big data/AI analysis. Prior to that Nico worked in the investment banking environment for a leading German bank in Frankfurt and Hong Kong.

Nico holds a M.Sc. in Management & Finance.

Dr. Pascal Botteron - Green Blue Invest

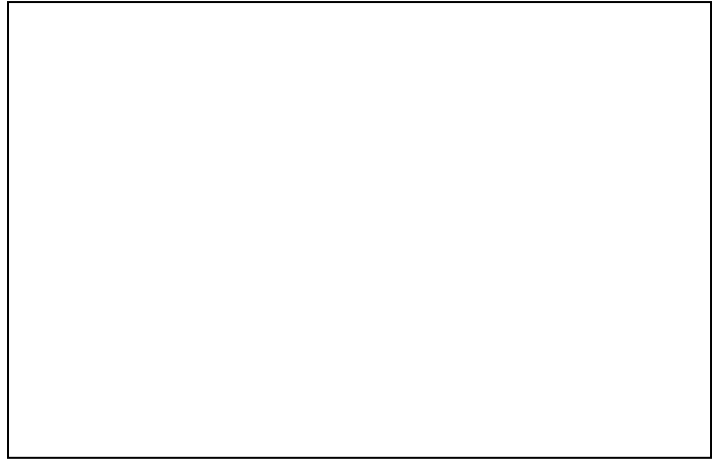


Pascal Botteron is Founding Partner and Chief Executive Officer at Green Blue Invest (2018-present). Previously, Pascal worked at Bank J. Safra Sarasin (2017-2018) as a Managing Director. Prior to this, Pascal worked at Deutsche Bank in several Global roles based in the UK and Switzerland: Global Head of Alternatives Investments and long only in Wealth Management (2004-2012), Global Head of Alternatives Distribution in Asset Management (2012-2015), Global Head of Product Marketing and Digital Transition in Wealth Management (2015-2017). He also held roles at Pictet & Cie in product development (2003-2004), KPMG (1999-2001) and Ernst & Young (2001-2003) in risk consulting for roles.

Pascal has been Professor and Lecturer at the University of Lausanne (1999-2004), the Swiss banking School (2000-2004), Thunderbird (2000-2003), the University of Zurich (2003-2008) and HEC in Paris (2001) lecturing on derivatives, applied econometrics, risks and asset valuation. Pascal holds a PhD in Finance, a Master of Science in Economics and a License in Economics from the University of Lausanne.

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Debjit D. Chaudhuri - Frankfurt Business Ambassador to India



Dr. Eric Endress - ACATIS Investment



Eric studied Theoretical/Computational Physics at the Johannes Gutenberg University in Mainz and received his PhD from the Universidad Autónoma de Madrid, Spain.

Before joining ACATIS in 2017, he was a research scientist at the Pontificia Universidad Católica del Perú, where he was involved in research projects at CERN and Fermilab, among others.

He is responsible for Artificial Intelligence at ACATIS.

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Michael Günther - Tungsten Capital



Michael Günther has been a founding board member of TRYCON G.C.M. AG since 2002 and additionally, since 2013, a portfolio manager at Tungsten Capital, an asset management company based in Frankfurt am Main.

Since the year 2000, he has been engaged with systematic trading strategies and the application of machine learning and artificial intelligence to the financial markets and is co-managing one of the oldest AI-based UCITS funds.

Michael Günther, together with Pablo Hess, is responsible for the development of the proprietary portfolio software QuantMatrix, which applies artificial intelligence and machine learning for the trading strategy of the Tungsten TRYCON AI Global Markets fund.

The multi-asset long / short fund provides investors with access to new data analysis technologies and artificial intelligence and has received several awards.

Sebastian Hermanns - Berenberg



Sebastian Hermanns is a Senior Data Scientist in the Innovation & Data team at Berenberg Wealth & Asset Management. The team has a focus on research, new technologies and is working on improving our platform using these new technology & approaches. Furthermore the team is managing several FX mandates for European clients and a public AI based investment fund in Germany.

Previously Sebastian was working for a Tier 1 Consulting Firm, running several AI projects for multinational clients.

Sebastian holds a M.Sc. in Statistics & Data Science from the University of Edinburgh.

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Johannes Hirsch - Antea AG



Johannes, is the co-founder of Antea, a Hamburg based multi-family office formed in 2001. Prior to this, he worked more than 18 years as a portfolio manager and as a relationship manager for several banks in Hamburg and Frankfurt. The Antea Fund, launched in 2007 is a multi-asset strategy, managed by external specialized managers with low correlation between the price developments of the asset classes.

Johannes studied at the predecessor of the Frankfurt School and at the European Business School in Oestrich-Winkel.

Mike-Merritt Holmes - Kvasir Technologies



Mike, is COO and Co-Founder of Kvasir Technologies, an Emerging Manager focused on systematic AI based strategies.

An entrepreneur and leader at heart, Mike has taken businesses through to exit as well as holding senior positions in global organisations. Most recently, Mike was Co-Founder and CEO of Big Data Partnership, a Big Data and Data Science consultancy which he grew to its eventual acquisition in 2016. Through this and now Kvasir, Mike has lived and breathed AI in many business environments for over 10 years and along with his fellow co-founders and used this to build robust and innovative AI driven strategies.

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David Itzkovits - Sanlam GIS



David Itzkovits is the CEO of Sanlam Global Investment Solutions, a division of Sanlam, a 100 year old financial institution with global reach.

David has almost 20 years experience in the Financial Services industry and has worked in various positions with top international companies including at an entrepreneurial startup which was acquired by a \$100 Billion global investment firm. Prior to this, David worked for the offshore arm of Old Mutual as Regional Director, Europe and Canada where he was responsible for all business development. Before that, he was Vice President, HSBC Private Bank in New York where he co-managed a \$635 million portfolio of investment, credit and insurance for high net worth clients.

David is an acknowledged thought-leader in the use of Artificial Intelligence in the investments industry and is an international key-note speaker on the subject. He has been instrumental in driving the use of AI in investment management within the Sanlam Group, which offers multiple AI solutions including a UCITS AI fund.

David is a CFA Charterholder, an MBA from Ivey Business School at Western University and a Bachelor of Science from McGill University in Canada.

Julien Florian Jensen - Othoz Capital



Julien Florian Jensen is Executive Director at Othoz and jointly responsible for business development and fund management.

Julien has already co-founded and developed the asset management boutique KJL Capital GmbH, Frankfurt, which has a product partnership with Othoz. Prior to this, he gained professional experience in investment banking (equity derivatives trading/risk management) and asset management (portfolio management) in Frankfurt, Zurich and Hong Kong.

Julien studied economics at WHU - Otto Beisheim School of Management (Vallendar, DE), HEC Genève (Geneva, CH) and NEOMA Business School (Reims, Paris, FR).

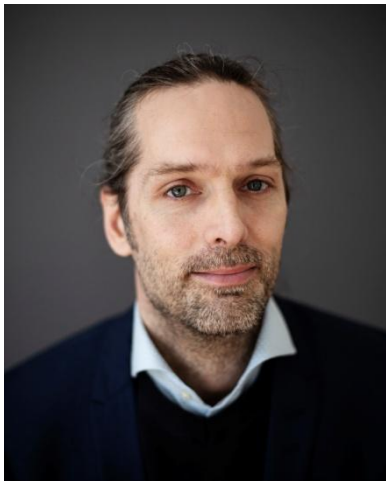
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Ragnar Kruse - AI. Fund



Ragnar Kruse is founder and CEO of AI.Fund, AI.HAMBURG, AI Invest and previously the co-founder and CEO of Smaato. From 2005 to 2019, he developed Smaato into the leading global real-time mobile advertising platform. In 2021, together with 5 regional partners, he initiated the AI.STARTUP.HUB, where AI startups from the Hamburg metropolitan region and the entire northern German region find their innovative haven. AI startups with a special focus on Applied AI, the application of artificial intelligence in business, are supported. With over 30 years of IT experience, Ragnar Kruse understands the unique challenges of bringing new technologies to market. In the USA as well as in Europe he built up several companies from the beginning to the market launch.

Hugo Langeen - Valid Alpha



Hugo Langéen is a co-founder and CEO of the Swedish crypto asset management company Valid Alpha, which launched the crypto arbitrage fund ValidOne in February 2022. Prior to Valid Alpha, Hugo co-founded and ran an AI-driven FX-fund.

His road to start and run algorithm-based hedge funds is not the usual one. Hugo started working as an alternate solo bassoon player in the Malmö Opera Orchestra before becoming one of the world's most renowned online poker players, specializing in big data and behaviour analysis. Bridging the gap to the fund businesses industry, Hugo traded his own portfolio for ten years while working with high-profile trading specialists in the process.

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Dr. Hendrik Leber - ACATIS Investment



Dr. Hendrik Leber studied Business Administration in Saarbrücken, St. Gallen (Switzerland), Syracuse and Berkeley (USA).

Before founding ACATIS in 1994, he worked for Bankhaus Metzler from 1989 to 1994 and for the management consultancy McKinsey from 1984 to 1989.

Dr. Leber is the speaker of the management board and portfolio manager.

Dr. Sascha Otto - Sparkasse Bremen



Dr. Sascha Otto, born 1978, after an apprenticeship at the Hamburger Sparkasse studied business administration and completed a PhD on the topic of efficiency market analysis at the London metal exchange. From 2000 until 2006 he worked as a wealth manager at the Hamburger Sparkasse.

From 2007 until 2008 he traded commodities at Bache Commodities Limited, London before returning to the Hamburger Sparkasse as an independent wealth manager until 2011.

Since 2012 Dr. Sascha Otto is responsible for the portfolio management of the Sparkasse Bremen AG. In this role, he also serves as managing director for the Smavesto GmbH, a 100% vertical of the Sparkasse Bremen that provides AI-driven investment solutions to retail customers.

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Mario Pofahl - Linklaters LLP



Mario specialises in advising corporate and financial investors on national and international M&A transactions, reorganisations and joint ventures, with a particular focus on technology companies.

He heads our German Asia Desk and is a member of the global technology sector as well as Co-Head of the Digital Economy Group.

Mario is regularly recommended as a leading M&A lawyer by JUVE, the German commercial law firm's directory.

Fred Sage - NextGen Alpha



Fred is currently the Chairman of NextGen Alpha AG a Swiss domiciled public limited company whose AI events, index and investment activities are dedicated to the application of AI to the investment management industry.

Fred has been an entrepreneur his entire career, was born in New York and currently lives in Germany with his wife and 3 children.

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Petra Vorsteher - AI. Fund



Petra is a true pioneer in the mobile industry and a serial tech entrepreneur; co-founder of AI.FUND, AI.INVEST, AI.HAMBURG, Smaato and Intershop.

After the sale of smaato, Petra and Ragnar Kruse founded AI.HAMBURG in 2019 and AI.FUND in 2021. Also in 2021 she co-initiated AI4Germany and the Transatlantic AI eXchange, a platform promoting exchange in the field of artificial intelligence between Germany and the USA

Petra who lived in Silicon Valley for over 40 years is one of the best globally networked female executives. She is very well connected in European and U.S. innovation ecosystem, former Hamburg Ambassador in Silicon Valley and today a representative of various institutions, including: Board Member ECIU University, Ambassador Hamburg University of Technology TUHH, AI Chair GABA California, Transfer Committee Hamburg Innovation, Committee of Innovation & Research at Hamburg Chamber of Commerce.

Dr. Daniel Willmann - Othoz Capital



Daniel Willmann is co-founder and managing partner of Othoz and the first point of contact for our clients. In addition to strategic corporate development, he is particularly responsible for product design and fund management.

Daniel gained professional experience in various professional services organizations in Munich, Frankfurt and London and worked as a research assistant and lecturer at the RWTH Aachen University.

Daniel studied economics with a focus on financial accounting and empirical asset pricing at WHU - Otto Beisheim School of Management (Vallendar, DE), the Stephen M. Ross School of Business (University of Michigan, Ann Arbor, US) and the London School of Economics and Political Science (London, UK). He received his doctorate from RWTH Aachen University (Aachen, DE) and was a visiting researcher at Wharton Business School (University of Pennsylvania, Philadelphia, US). Daniel is a recipient of the Anthony Hopwood Award of the London School of Economics for academic achievement and has published several articles on his empirical financial market research.