

## **L/S Equity Fund Investing**

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**Date :** Sep 17, 2018 - 12:30 PM

**Event URL :** <http://www.BostonEventsList.com/events/l-s-equity-fund-investing-sep-2018>

**Organizer :** Catalyst

**Venue :**

**Location :** Capital Grille - Wall Street120 Broadway, New York City,  
New York, NY, US, ZIP: 10001

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### **L/S Equity Fund Investing**

Catalyst Cap Intro events are investor driven and transactional events that host alpha-oriented investment managers and institutional grade investors that are introduced to each other with a view to become investment partners.

This Catalyst Cap Intro Event focuses on the **L/S Equity Fund Investing** sectors. Strategies covered include: Fundamental & Research, Long-biased and Long-only, Industry focused funds, Small/micro cap focus, International/global equity, Regional exposure, Merger arbitrage, Systematic equity, Overlay strategies, and more.

Introductions are accomplished through private meetings which are arranged prior the events, in an investor driven fashion based on the merits of each investment manager and the requests made by the investors.

Investors are pre-screened and pre-qualified prior the events, by questionnaires and talks. Investors constitute predominantly single and multi-family offices, endowment and foundations, and their advisors, located in the US but also internationally.

This event production builds on Catalyst's history and successful track record in putting together industry-recognized and effective capital raising events.

**RATIONALE TO ATTEND**  
**RATIONALE FOR**  
**MANAGERS:**

[www.BostonEventsList.com](http://www.BostonEventsList.com)

Get in-depth private meetings with active investors

Each event has a special strategy or asset class focus, to increase the fit with the investors

Meetings are investor driven, with investors requesting to meet with managers

Fees are competitive and early registration is rewarded

If your fund does not get enough interest, you may cancel and be refunded

To highlight exceptional managers, we are also giving out a 'Catalyst Cap Intro Award' to the best manager at the event as based on the investors' feed-back. This award will be official and listed on Catalyst's website.

## **RATIONALE FOR INVESTORS:**

Meet with managers in a certain sector or asset class in an extremely time efficient format

Benefit from getting introduced to managers that are pre-selected, best-in-class, and alpha oriented

Attendance is complimentary, granted you qualify as an investor

Review the short-listed managers before the event, and only request to meet with managers you are interested in; no 'minimum set' of meetings necessary

Benefit from learning from fellow investors' questions and perspectives

## **PRE-SCREENING PROCESS MANAGERS:**

We seek fund managers that are successful, small to mid-sized (about \$30m-\$1bn), and with a strong product offering. In particular, we look at a manager's:

Relevancy and strength of investment strategy

Performance track record and other metrics

AUM and AUM history for fund, strategy and firm

Liquidity and other investor terms

General fit with the short listed investors

## **INVESTORS:**

Each investor will undergo a multi-step qualification process in order to be granted admission to our events. In particular we look at an investor's profile, investing preferences, AUM, size of allocations made, and if there are any allocation restrictions (incl. size criteria of managers). The investors to a specific event are announced about two weeks beforehand to the registered managers. We also ask investors to join the 'Catalyst Capital Network', which further qualifies and ensures their fit to the events.

## **EVENT FORMAT**

BEFORE

[www.BostonEventsList.com](http://www.BostonEventsList.com)

## THE EVENT

Investors and managers are invited and sign up to an event

Investors are pre-screened and pre-qualified

Managers receive event details and pay event fees

Investors are sent descriptions of investment managers' profiles, with up to 50 investors reviewing the managers

Investors request which managers to meet with

The confirmed investor meetings are sent to the managers. If a manager doesn't get a minimum of meetings scheduled, they may cancel and be refunded

## AT THE EVENT

Participation of managers is capped, with approximately 1:2 ratio of managers to investors

Exclusive luncheon with short presentations by the managers

Participants are given out an event binder, containing the managers' fund summaries

Coffee networking break

An afternoon with consecutive, private meeting sessions

Closing with networking reception

## THE PRIVATE MEETINGS

At the event, the meetings are in 35 minute intervals and consist of one manager and one or two investors

The meetings take place in exclusive, closed-door rooms which make the experience pleasant, professional and personal

Managers can bring any materials they want

Upon request, AV equipment is available to managers for presentations  
award-winnerlarge

## AFTER THE EVENT

We may share feed-back from introduced participants 4-6 weeks after the event. This is an efficient way to make sure you make the most of your introductions, and follow up with the appropriate investors quickly

Announcement of the 'Catalyst Cap Intro Award' to one of the participating managers at the event

## **EVENT AGENDA AGENDA:**

The general agenda for this Catalyst Cap Intro Event is:

[www.BostonEventsList.com](http://www.BostonEventsList.com)

12:30pm : Registration opens

12:45pm : Lunch and introductory talks by fund managers

1:45pm : Networking break

2:00pm : Afternoon private meetings in 35 minute intervals

5:00pm : Cocktail Reception

6:00pm : Closing of the event

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**Event Categories :**