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PROFILE SUMMARY

Investment manager with over 27 years of experience: 5.5 years in corporate finance and 22 years on the buy side. Track record of absolute return investing across business and market cycles through a diverse range of strategies and asset classes, including risk arbitrage, relative value, stressed and distressed situations, capital structure arbitrage, private equity, direct lending, and special situations.

CORE COMPETENCIES

Merger Arbitrage • Event-Driven Investing • Relative Value • Capital Structure Arbitrage • Stressed & Distressed Credit • Private Equity • Direct Lending • Special Situations • Portfolio Management • Strategic Asset Allocation • Structured Credit • Litigation Finance • Financial Restructuring • Equity Activism

WORK EXPERIENCE

Sargasso Partners — Partner and Portfolio Manager — London, UK **Apr 2024 – Present**

- Strategic asset allocation with cost-cautious and tax-aware overlays for a select number of families
- Opportunistic direct investments across the capital structure and liquidity spectrum: public and private equity, direct public and private credit, structured credit, litigation finance, stressed and distressed credit, liquidation plays

Bell Rock Capital Management — Portfolio Manager — London, UK **Jan 2022 – Nov 2023**

- Relative value and special situations strategies including share classes, holding companies, spin-offs, exchange offers, self-tenders, and M&A
- Focus on European and North American markets

Per4m Asset Management — Senior Fund Manager — London, UK **Jun 2019 – Dec 2021**

- Event-driven opportunities across the capital structure: merger arbitrage, share class arbitrage and relative value, holding companies, financial stress, capital structure arbitrage
- Boutique wealth management organisation

Tyrus Capital SAM — Global Event Driven — Equity and Credit — Monaco **Dec 2015 – Nov 2018**

- PM of a \$100m capital allocation focused on special situations across the capital structure (2016)
- PM of a \$200m capital allocation focused on merger arbitrage (Jan 2017 – Feb 2018)
- Credit PM for the main \$2b+ event fund; expanded the firm's focus to credit special situations, leading two financial restructurings in oil and gas (Pacific Exploration & Production, Halcón Resources) in 2016

Magnetar Capital — European Event Driven Credit — London, UK **Dec 2014 – Sep 2015**

- Successfully established the European event-driven strategy as part of a group running a \$2b global capital allocation (total firm assets c.\$11b)
- Indicative book size: \$180m. High yield stressed situations and one direct lending transaction (€60m)
- Departed following a corporate strategy restructuring and radical leadership change

Elliott Associates — Global Situational Investing — London, UK **May 2004 – Nov 2014**

Direct report to Jon Pollock, Europe and Asia Head (currently Co-CEO, Co-CIO, Head of Trading)

- Merger arbitrage and equity activism
- Share class relative value and arbitrage
- Capital structure arbitrage; stressed and distressed situations
- PE and direct lending investments in oil and gas, mining, agriculture, and power generation
- Experience across developed markets (Europe and North America) and emerging markets (South America and West Africa)

Lehman Brothers — Global Trading Strategies (GTS) Group — London, UK **Jun 2003 – Apr 2004**

- Proprietary investment unit with a \$3–4b capital allocation and a 20+ year track record of absolute return investing in merger and share class arbitrage, and stressed and distressed situations

Lehman Brothers — European Corporate Finance / M&A — London, UK **Mar 1998 – Jun 2003**

- Junior member of the 3-person lead coverage and execution team on the Olivetti/Telecom Italia group restructuring following the 1999 hostile takeover
- Extensive involvement in M&A, equity, and debt capital market transactions
- Co-ordinator of the European Analyst and Associate Training Program (2001–2003)
- Co-ordinator of the Investment Banking Analyst Class of 2000 recruitment efforts

EDUCATION & CERTIFICATIONS

Bocconi University — Milan, Italy

Degree in Economics and Business Administration — 110/110 *summa cum laude*. Dean's Gold Medal scholar.

University of British Columbia — Vancouver, Canada

International Exchange Program

CFA Institute — Chartered Financial Analyst

PERSONAL INTERESTS

Skiing, swimming (swam across the English Channel and around Manhattan for charity), marathon cycling, sailing, classical music.