

LONDON INVESTMENT FORUM MEETING OF THE MINDS

OUTLOOK: MACRO, TECH, HEALTH, SUSTAINABILITY & THE FUTURE OF FOOD



Join us for a thoughtfully curated investor forum, presented by leading industry experts, focusing on emerging technologies, alternative equities, and sustainability. We will explore the future of sustainable investing in the areas of technology, food, and health, through traditional and alternative investments.

SAVE THE DATE

15 OCTOBER 2024

**IOD & RAC
PALL MALL**

FEATURED SPEAKERS:

**KARINA FUNK, CFA & HEAD OF SUSTAINABILITY
BROWN ADVISORY
SUSTAINABLE INVESTING: FROM NICHE TO NORM**

**GEORGE MICHELAKIS, CIO GLADSTONE CAPITAL:
CHANGING LANDSCAPE FOR ALTERNATIVE EQUITIES**

**LOU COOPERHOUSE, CEO BLUENALU:
REIMAGINING THE FUTURE OF FOOD**

**JOHN GELLATLY, LIGHTSPEED ROBOTICS
ROBOTICS AND THE FUTURE OF HOME HOMEBUILDING**

**DAVID TAICLET
MANAGING PARTNER LEWIS & CLARK AGRIFOOD:
THE AGRICULTURE AND FOOD SUPPLY CHAIN**

**BEN DELDAR, CO-FOUNDER DEEP MEDICAL:
PREDICTIVE AI IN HEALTHCARE**

**DAVID MARTIN, CEO US AGRICULTURE:
FUNDAMENTALS FOR INVESTING IN US FARMLAND**

**GREG DOYLE, CEO ERGENY INVESTMENTS:
FAMILY OFFICES 2.0, A NEW BREED IN ASSET MANAGEMENT**

THE CONFERENCE WILL FOCUS ON:

- **ALTERNATIVE EQUITIES:** Identifying growth opportunities among evolving sectors and individual companies.
- **ARTIFICIAL INTELLIGENCE & MACHINE LEARNING IN HEALTHCARE:** Discovering how AI is revolutionizing health care, creating new investment avenues, and improving patient outcomes.
- **SUSTAINABLE INVESTING:** Exploring the intersection of emerging tech industries and companies through sustainable and impact investment decision-making.
- **INVESTING IN U.S. AGRICULTURE:** Uncovering the fundamentals and challenges in farmland as an asset class: a spike in global meat consumption, ethanol demand, the high interest rate environment, and increasing speculation.
- **THE FUTURE OF FOOD:** Examining how technology, sustainable food production prerogatives, and the rise of food security initiatives on behalf of sovereign wealth funds in regions with scarce arable land, are not traditionally associated with efficient food production and farming.

AGENDA

DATE: 15 OCT 2024

LOCATION: IOD 08:00-17:00

116 Pall Mall, London

LOCATION: RAC 17:15 - 19:00

89 Pall Mall, London

AGENDA	TOPIC	PERSON IN CHARGE
8:00 - 08:15	- BRIEF INTRODUCTION OF THE DAY - COFFEE & NETWORKING	Cate Kenworthy MD, Howden Capital Markets & Advisory Greg Doyle, Ergeny Investments
08:20 - 09:00	CHANGING LANDSCAPE FOR ALTERNATIVE EQUITIES	George Michelakis CIO, Gladstone Capital
09:05 - 09:45 MORNING KEYNOTE	THE FUTURE OF FOOD, AND HOW TECHNOLOGY WILL TRANSFORM THE WAY WE GROW, PROCESS, DISTRIBUTE AND CONSUME FOOD IN THE COMING DECADE	Lou Cooperhouse CEO, BlueNalu
09:50 - 10:20	ROBOTIC AND THE FUTURE OF HOMEBUILDING OVER THE NEXT TEN YEARS	John Gellatly, Lightspeed Robotics Panellists, Page 4
10:20 - 10:50	COFFEE BREAK & NETWORKING	
10:50 - 11:30 KEYNOTE	A TACTICAL APPROACH TO INVESTING IN SUSTAINABLE U.S. FARMLAND	David Martin CEO, US Agriculture
11:35 - 12:05	PANEL DISCUSSION ON GROUNDBREAKING ADVANCEMENTS IN ARTIFICIAL INTELLIGENCE AND THEIR TRANSFORMATIVE IMPACT ON THE HEALTHCARE INDUSTRY	Greg Doyle, CEO Ergeny Investments Ben Deldar, Founder Deep Medical Panellists, Page 4
12:05 - 13:35	NETWORKING LUNCH	
13:35 - 14:15 AFTERNOON KEYNOTE	AN INVESTORS VIEW OF THE CURRENT AGRIFOOD SYSTEM TRANSFORMATION	David Taiclet, Managing Partner Larry Page, Managing Director Lewis & Clark Agrifood
14:20 - 14:50	ALTERNATIVE INVESTMENTS: BETA BY ANOTHER LABEL OR UNCORRELATED RETURNS?	Peter Thompson CIO for a private family office. Panellists, Page 4
14:50 - 15:20	COFFEE BREAK & NETWORKING	
15:20 - 16:00 FIRESIDE CHAT	SUSTAINABLE INVESTING: FROM NICHE TO NORM	Karina Funk, Chair of Sustainable Investing, Brown Advisory & Greg Doyle, CEO, Ergeny Investments
16:05 - 16:45	Q&A: BRINGING IT ALL TOGETHER	Simy Prakash Partner, Genpact Panellists, Page 4
16:50-17:00	CLOSING REMARKS	Greg Doyle CEO, Ergeny Investments

17:15 COCKTAILS & NETWORKING AT THE ROYAL AUTOMOBILE CLUB 89 PALL MALL

SPEAKERS



GEORGE MICHELAKIS, GLADSTONE CAPITAL

George is the Founder of Gladstone and, as CIO, has overseen the Lasker Fund since its inception in 2006. Before founding Gladstone, George was on the investment team of the Lansdowne Developed Markets Fund (London, 2003-2005). Prior to that, he was a Principal in the Private Equity business of Capital Z Partners (London, 1999-2003).



KARINA FUNK, BROWN ADVISORY

Karina is a partner and co-portfolio manager of the Brown Advisory Large-Cap Sustainable Growth Strategy (LCSG) and chair of sustainable investing. Karina joined Brown Advisory in 2009 and has extensive investment experience spanning early-stage ventures to debt and public equities.



LOU COOPERHOUSE, BLUENALU

Lou Cooperhouse is recognized as a leading global authority in food business innovation and technology commercialization. He has extensive leadership experience throughout his 40-year career in the food industry.



DAVID TAICLET, LEWIS & CLARK AGRIFOOD

Managing Partner for Lewis and Clark AgriFood, a leading sustainable food and agribusiness investment group that deploys expansion capital into late-stage venture and growth equity opportunities, especially those utilizing innovative technologies.



LARRY PAGE, LEWIS & CLARK AGRIFOOD

As a Managing Director at Lewis & Clark AgriFood, Larry is responsible for all facets of fund management, including raising funds, leading investments, and corporate governance via board membership.



BEN DELDAR, DEEP MEDICAL

Ben is the Co-CEO and business development leader at Deep Medical. His background is in medical imaging and neurointervention, and he's worked at a number of high profile institutions including Guys and St Thomas Hospital, Epsom and St Heliers NHS Trust and a research fellowship at Johns Hopkins University, where he co-authored the Hopkins manual of Neurointervention. He also holds a distinction in radiology from Harvard Medical School.



DAVID MARTIN, USAG

David is the Managing Director overseeing all strategic and operational aspects of US Agriculture, LLC and is a member of its Board of Managers. Prior to joining the firm, David was Vice President at Halderman Real Asset Management, where he was responsible for the institutional farmland investment program.



GREG DOYLE, ERGENY INVESTMENTS

Greg is the CEO of Ergeny Investments in Monaco. He began his career in London as an equity trader. Greg accepted a role at Kruger Pension, Montreal, in 1999, eventually becoming CIO. In early 2024, Greg returned to Europe for his current position, leading the operations of a major Monaco-based family investment office.



JOHN GELLATLY, LIGHTSPEED: ROBOTIC HOMES

John has been active in the real estate sector and wider investment markets for over 35 years and, in that time, has held a variety of roles providing him with very broad experience and knowledge of analysing, investing and managing real estate assets, platforms and products from both the debt and equity perspectives across multiple geographies and sectors.

Panellists

ROBOTIC AND THE FUTURE OF HOMEBUILDING OVER THE NEXT TEN YEARS

John Gellatly, Lightspeed
Leo Berant, UBS
David Doberman, SFO
Pedro Jacome, Altmapa Capital

Moderator:
Jason Funk, 1783 AG Insurance

ARTIFICIAL INTELLIGENCE AND THEIR TRANSFORMATIVE IMPACT ON THE HEALTHCARE INDUSTRY

Ben Deldar, Deep Medical
George Ruetter, Kepler Partners
Ian McKnight, Clota Varde

Moderator:
Greg Doyle, Ergeny Investments

ALTERNATIVE INVESTMENTS: BETA BY ANOTHER LABEL OR UNCORRELATED RETURNS?

Georg Reutter, Kepler Partners
Melanie Owen, Apstone Capital
Alex Campbell, Altus
Simone Tarozi, Redington

Moderator:
Peter Thompson, SFO

BRINGING IT ALL TOGETHER Q&A

Ben Deldar, Deep Medical
George Michelakis, Gladstone
Karina Funk, Brown Advisory
Lou Cooperhouse, BlueNalu
Larry Page, Lewis & Clark Agrifood
Evan Newton, USAG

Moderator:
Simy Prakash, Genpact

Supporters



ALTUS

