

## Carlisle Management Company - Jose C Garcia

Fund Manager of the Year 2016 - Luxembourg & Award for Excellence in Fund Structuring - Luxembourg



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Carlisle Management Company is a regulated investment management firm located in Luxembourg. The firm specializes in both, open-ended investment funds and related private equity transactions within the alternative space. Carlisle provides its global client base with access to insurance-linked investment products by offering intelligent alternative fund management solutions designed to work with a wide array of institutions, corporations, pension funds and high-net-worth individuals.

### Alternative assets

Jose C. Garcia, CEO of Carlisle Management Company provides details about the funds Carlisle manages and the company's approach to managing risk and ensuring the best possible returns for investors. "Carlisle specializes in the alternative assets sector. We believe that offering investors access to asset types outside the traditional range of choices (i.e. equities, bonds, money markets) helps further diversify their investment portfolios, and therefore helping to mitigate and diversify their overall risk level" he explains.

"Our company's flagship product, The Luxembourg Life Fund, focuses on life settlements, an asset class that holds minimal correlation to traditional economic drivers such as interest rates and other economic indicators. This allows us, to focus on minimizing the specific risks of the particular underlying assets and do so without an elevated degree of concern regarding what might be happening in the overall economy at any given moment. Through diversification, stringent quantitative analysis and stress testing, the Luxembourg Life Fund provides above average returns with minimal correlation. This provides investors with real value."

### Alternative Investments

Garcia then outlines his views on the state of the finance industry in the Luxembourg region at present and the major challenges it currently faces and the major external influence factors?

"Alternative Investments, as an asset class, has received a significant increase in exposure and utilization since the financial crisis that began back in 2008" he replies.

"The entire global investment community witnessed one of the worst financial breakdowns in the history of the modern world and quickly learned to appreciate the benefits of diversifying beyond the mainstream of the traditional asset classes. As investors and institutions seek out strategies with lower levels of correlation to traditional market drivers such as interest rates and



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geopolitical events, those offering well structured, quality alternative investment strategies have an opportunity to widen their investor base.

“The biggest challenge remains, investor education. Alternative assets are by nature new and lack, standards and benchmarks, so it is challenging to provide the investment community with the information it needs to make investment decisions. However, as the alternative market continues to thrive, these obstacles are beginning to disappear.”

#### Adapting to change

In the view of Garcia, “proactivity is key to success in this industry”, when quizzed about the attributes a company in his industry should possess in order to become truly successful and be able to provide the best possible service to its clients. Going into more detail on this point, he explains, “A company must be willing to change as the marketplace evolves and becomes more efficient. That pertains to areas such as management strategy and technology as well as regulation and compliance. Offering fully compliant and truly transparent products demonstrates to existing and potential investors that, as a manager, you are committed to the best interest of your clients and are willing to provide them with all the necessary information in which to base their decision, even in the absence of benchmarks.”

“The alternative assets industry is still in a period of growth in terms of exposure and overall acceptance. This means that the inner mechanics and regulatory environment for both funds and managers will continue to develop. Staying current and knowing when to get out in front of emerging trends will differentiate the true market leaders from the rest of the competition” he continues.

#### Investment philosophy

When asked about his firm’s overriding philosophy in terms of choosing funds to invest in, “Carlisle has always been considered to be more of a holistic investment manager, so the company’s philosophy reflects this perspective” explains Garcia.

“We prefer to take a comprehensive view on the whole range of tasks that occur over the entire investment life cycle. You cannot build a truly superior product without a view of the full picture, and that’s important to us as a company. Carlisle’s values and therefore its mission, are relatively straight forward. To offer the most efficient and individually designed products and services to our clients, based on their unique goals and investment parameters.

“It’s important that everyone at Carlisle shares these core values and paradigms and we’ve spent many years assembling the right blend within our management which represents nearly a century of cumulative financial management experience. Carlisle’s main approach is to empower the investor with the necessary information to make a wise investment decision, while having a tireless commitment to quality.”

While the hedge fund industry is an incredibly diverse and fast-paced place to do business, in what way does Carlisle Management Company ensure it remains on the cutting edge of new developments and that they are always best placed to meet their clients’ needs? The last word goes to CEO Jose C Garcia who responds to the question on an upbeat note: “Carlisle prides itself in staying ahead of the curve in terms of evolutions within the investment industry and our specific asset sectors. Constantly monitoring economic conditions, market and sector developments and regulatory changes, the firm stays out in front of market trends. By listening to its investors and their needs, Carlisle designs investment structures that not only take into account the ever changing markets but that can keep investors requirements well into the future. Staying in the cutting edge and longevity within a market, comes from two sides, the investment proposition and the investor needs.”

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