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# Carlisle Management Company

Carlisle Management Company SCA is a Luxembourg-based investment management firm specialising in open ended and closed ended investment funds and related private equity transactions within the alternative asset sector, most notably in the life settlements market. Having recognised the firm over the past few years we decided to profile it in honour of its win in this year's Hedge Fund Awards.

Since its inception in 2008, Carlisle has garnered a reputation as a pioneer and market leader for investment solutions in the life settlements space, and has experienced strong growth as a result, serving institutional clients, most notably, Family Offices and Pension Funds.

Originally, Carlisle Management was founded by a management team with a substantial history of working together previously during turbulent financial markets around the world. These turbulent times served as a sign to Carlisle's team that investors needed more alternatives to achieve higher levels of protection and diversification, and that alternative assets would become prevalent in years to come.

From the beginning, the primary focus of the firm has been their expertise within the life settlements industry, creating, structuring and managing yield-oriented and tax optimised investments for institutional investors and financial intermediaries, specifically within this asset class. The team saw the need for investments that were truly uncorrelated and wanted to design investment products for investors who were seeking stronger organisational infrastructure, greater regulatory oversight, institutional counterparties and higher diversification through minimal correlation to traditional financial markets.

Over the years, the life settlement industry has grown at a phenomenal rate over the last decade, and Carlisle and its flagship fund, the Luxembourg Life Fund has been able to take full advantage of this growth by pioneering a number of different fund features in the space. As a pioneer in the industry, Carlisle first introduced and continues to utilise mark-to-market valuation systems and independent service providers as key elements of the underwriting and valuation process. Combined with tax-compliant, regulated investment structures, it is these innovative measures that have allowed Carlisle to secure consistent results while offering fully transparent investment products to its knowledgeable and discerning investor base.

**“Carlisle has become one of the founding partners of the Alliance for Senior Health Care Financing, a coalition of industry members aimed at raising awareness of life settlements within the senior community.”**



Today, due to current financial market stagnation, many investors are concerned about an upcoming market correction and have demanded a close-end fund solution to address these concerns. It is in that respect that Carlisle has decided to launch the first of several close-end fund vehicles, Absolute Return Fund I, which will provide protection against future market downturns. The fund is already available to investors and will provide investors with a cash-in, cash-out investment vehicle where all incentives are aligned, while providing the same level of quality and transparency that Carlisle's investors have come to rely on and expect.

Looking to the future, a potential challenge for the life settlement space is supply restrictions in the market. In order to address this, in 2018 Carlisle has become one of the founding partners of the Alliance for Senior Health Care Financing, a coalition of industry members aimed at raising awareness of life settlements within the senior community. Through participation in industry events, and direct to consumer marketing campaigns, the firm hopes to make a difference and improve supply in the market to sustain future industry growth. Overall, the team believe as the market continues to evolve Carlisle is extremely well positioned to take advantage of upcoming trends and opportunities for its investors.