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David Bush of Alphatative Wins Third Annual 2016 NAAIM Shark Tank

May 16th, 2016

During the 2016 Uncommon Knowledge conference in Fort Lauderdale, FL last week, the National Association of Active Investment Managers (NAAIM) announced that David Bush, Founder and Managing Member of Alphatative LLC in the greater Cincinnati, OH area is the first-place winner of the 2016 NAAIM Shark Tank Competition for his investment strategy: **STRATVERSIFY®**. [Find out more about NAAIM Shark Tank](#)

In its third year, the NAAIM Shark Tank competition is an opportunity for the developers of active investing approaches to pitch their strategies to fellow advisers and active investment managers in pursuit of sub-adviser agreements. For the 2016 investment strategies competition, twelve presenters were chosen to compete in the NAAIM Shark Tank preliminaries on November 3, 2015 during the NAAIM 2015 Outlook Conference. Six finalists were chosen to present during the final session of this year's 2016 NAAIM Uncommon Knowledge national conference. [Discover the six NAAIM Shark Tank Finalists.](#)

"What began three years ago as a means to give NAAIM members exposure, and potential distribution, has yielded 3 emerging managers, each with their own unique approach to asset management," said Ted Lundgren, 2016 NAAIM Chairman and Shark Tank Committee Chair. "The NAAIM Shark Tank competition has grown and taken on a life of its own, attracting new members to the NAAIM professional association and leading to new business relationships for both asset gatherers and managers".

David Bush is the Founder and Managing Member of ALPHATATIVE LLC, which develops and manages several quantitative equity and ETF strategies logically driven with the goal of delivering superior absolute returns. Our philosophy is best expressed by the late mathematician Mandelbrot who said: **"Bottomless wonders spring from simple rules repeated without end."** Whether in nature or markets, simple things are more robust and better suited for adversity. For this reason, while sophisticated, our strategies embrace simplicity and durability.

Entered in the "Established" category, Bush presented information on his tactical strategy Stratversify®, a long-short equity program. Through his investment firm ALPHATATIVE, Bush employs the multiple award-winning quantitative long/short equity strategy Stratversify® with the goal of delivering superior risk-adjusted returns in both healthy and distressed environments while minimizing the incidence of down months and magnitude of drawdowns. The strategy is a low beta strategy of nine proprietary systems which dynamically allocate capital to mega-cap equities – all without leverage. Developed over a survivorship bias-free dataset, Stratversify® applies capital exclusively when history shows a statistically-defined positive expectation at a portfolio level. In addition to its original long/short version, Stratversify® will soon be offered as a long-only strategy and available as stand-alone signals.

The competition judges were comprised of a panel of investment professionals selected by the NAAIM Shark Tank committee. The panel of judges included John Hill of Epix Capital, Patrick

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Beaudan of Beveledere Advisors, LLC, Paul Montgomery of Scotia Partners, and 2015 NAAIM Shark Tank Winner John McClure of ProfitScore Capital Management.

For more information about the NAAIM Shark Tank, please contact the NAAIM office at the contact numbers above.

About the Winner



David Bush is Founder and Managing Member of Alphatative LLC in Cincinnati, OH and is a seasoned trader with over 20 years experience in financial markets. He is the First Place Winner of BattleFin's "Sharpe Ratio Shootout" international quant finance tournament out of over 3200 applicants from 41 countries. Well-versed in multiple trading platforms and languages, David brings years of discretionary knowledge, creative arts background, and risk management experience to his quantitative research, systems, and portfolio strategy Stratversify®. An accomplished musician who spent his early years performing with Grammy-winning and nominated artists, David credits the discipline of music for his affinity and passion for financial market patterns, as both fields manifest emotion in rhythm. David's comments, interviews, photos and/or mentions have appeared in the New York Times Dealbook, QuantFORUM, Hedge Fund Alert, Trader's Magazine and elsewhere. A student of Manhattan's New School and the Mannes Conservatory, David is a graduate of the New School for Social Research with a B.F.A. in Jazz and Contemporary Music.

About NAAIM

The National Association of Active Investment Managers (NAAIM) is a non-profit trade group of more than 200 registered investment advisor firms and individual members that collectively manage over \$35 billion in assets. NAAIM members provide active money management services to their clients to produce favorable risk-adjusted returns as an alternative to more passive, buy-and-hold investment strategies. NAAIM publishes the weekly NAAIM Exposure Index, and sponsors the annual Uncommon Knowledge conference along with smaller conferences and regional workshops on managing portfolios, trading techniques for various instruments and markets, regulation and compliance, and other topics of interest to its membership. For more information, visit www.naaim.org

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NAAIM was formed in 1989 as a non-profit association of registered investment advisors who provide active money management services to their clients, in order to produce favorable risk-adjusted returns as an alternative to more passive, buy and hold strategies.

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