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HOME OBEX SECURITIES OBEX INVESTMENTS

LEADERSHIP ACHIEVEMENTS CONTACT



OBEX INVESTMENTS LLC

OFFERING UNBIASED ALTERNATIVE ASSET ALLOCATION
INTO THE MARKETPLACE

OBEX Investments LLC, is a registered investment advisor. Founded in 1998, by Randy Katzenstein, “Investments” was formed to meet the demands of a growing investor community that recognizes the added benefits in dealing with a boutique advisory and consulting firm. Our clients include high net worth individuals, pension funds, university endowments, public funds and insurance companies.

ASSET MANAGER SELECTION SERVICES

- Customized managed account programs; allocation of assets to external managers is based upon objective market analysis, vetted by careful due diligence, and with an emphasis on minimizing risk and maximizing reward.
- Product expertise across both traditional long-only managers, who utilize little if any leverage, to alternative managers, such as hedge funds, private equity and venture capital.

OTHER CONSULTING SERVICES

- OBEX is active in offering advisory services to private enterprises in the acquisition, disposition and restructure of varied assets.
- Risk Management.
- Precious Metal and PGM financing and leasing.
- Structured Business Transactions.
- Special Purpose Vehicles.

IN-HOUSE FUNDS MANAGEMENT

MARKET NEUTRAL FIXED INCOME STRATEGIES & QUANTITATIVE EQUITY STRATEGIES

- OBEX utilizes proprietary models across different asset classes.
- Results are uncorrelated with market direction and are enhanced through leverage.
- Goals are low monthly volatility with a level of risk commensurate with the expected returns.

HEDGE FUND PLATFORM-SERVICES FOR NEW MANAGERS

- OBEX provides low cost hedge fund solutions for new managers.
 - Bermuda registered Segregated Asset Class platform incorporating legal, administrative and accounting services.
 - Infrastructure including compliance, back office and office space.
 - Various prime brokerage services, execution destinations and enhanced leverage providers depending on the requirements of the manager.
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