



Press Release

The Strategy Data Exchange (SDX) Adds LCM Suite of Tactical/Risk Managed Strategies

August 29, 2018

SDX is pleased to announce the addition of Lee Capital Management (LCM) and their tactical/risk managed strategies to the SDX model manager gateway.

The addition is in response to the exceptional investor demand across Asia, Europe, and the USA for proven alpha generating strategies managed by world renowned institutional alternative investors. LCM has made their strategies available as model portfolios for APAC investors via SDX. Following the APAC rollout LCM plans to make their models available in Europe via SDX as well.

LCM, now an independent firm, was founded by legendary private equity investor Thomas H. Lee and members of his family office team. LCM is led by investment veterans with an average of 31 years of industry experience. The firm manages and advises across a broad array of investments for prestigious institutional and individual investors. The LCM team concentrates on providing investors with products and solutions that seek to capture the expected long-term capital appreciation provided by equities while seeking to mitigate the full downside of the worst return periods. LCM focuses on absolute returns rather than benchmark relative returns; believes that risk is the danger of significant loss, not the volatility of daily results. The firm is an SEC registered investment advisor headquartered in Wellesley, Massachusetts.

The initial LCM strategies available via SDX are:

- Lee Adaptive Large Cap Sector Strategy
- Lee Adaptive US Equity Strategy
- Lee Adaptive Global Equity Strategy
- Lee Adaptive Global Allocation Strategy

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Frank Troise, Founder of SDX, commented: “LCM’s extraordinary pedigree is another example of an industry legend like Thomas Lee recognizing the value of a quantitative investment thesis today,” said Troise. “The LCM team has a long-proven history of generating alpha for investors. The strong positive response from SDX’s distribution partners in both Asia and Europe has confirmed investor demand for their suite of strategies.”

Joseph L. Demmler, LCM’s Managing Partner, commented: “We are very excited to introduce our strategies and model portfolios to Asia for the first time. The SDX platform enables the immediate deployment of our strategies across the widest spectrum of distributors and manufacturers throughout Asia. We believe our distinctive approach to managing risk from the client’s perspective is very well suited to the Asian marketplace.”

For further information, please visit: www.sohocap.com/sdx

Note to editors

About SoHo Capital

SoHo Capital LLC is a private investment company founded in 1997. The company has grown to encompass a broad portfolio of interests. The company employs a simple investment philosophy looking for value opportunities where its capital, flexibility, management support, and strategic hand can build value. SDX is a wholly owned subsidiary of SoHo. SDX is a technology company and model manager gateway founded in 2017 to distribute model manager data to distribution partners ranging from the world’s leading investment banks, private banks, insurance companies, brokerages, platforms/core banking systems, and the ubiquitous social media platforms providing financial solutions.

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