



Our mandate is to consistently grow
your capital while protecting it against loss.

GROW AND PROTECT YOUR WEALTH

[VIEW OUR STRATEGIES](#)



Waratah Capital Advisors is a Toronto-based asset manager that specializes in alternative strategies.

Waratah manages over \$1.4 billion in assets from high-net-worth individuals, family offices, foundations, Canadian bank platforms, and pension funds. With a team of 34 experienced professionals, Waratah combines intensive research-driven stock selection with a disciplined and robust risk management program. Founders and employees collectively represent over \$100 million of the firm's assets under management.

34

STRENGTH IN NUMBERS

MEET THE TEAM

We are a skilled team of 34 investment and business professionals. Our Executive Committee has varying backgrounds in mergers and acquisitions, private equity, portfolio management and

optimization, investment banking, and sell side research. The team is also well positioned to meet the challenges in the constantly changing environment with expertise in risk, prime brokerage, operations, and corporate finance.

Blair Levinsky

Co-Founder, President, and Chief Executive Officer

Brad Dunkley

Co-Founder, Chief Investment Officer and Chief Risk Officer

Dimitri Michalopoulos

Chief Operating Officer and Chief Compliance Officer

Jason Landau

Executive Vice President and Portfolio Manager

Jessica Clark Barrow

Executive Vice President, Investor Relations

Ron Lloyd

Executive Vice President, Investor Relations

Bill McGill

Executive Vice President, Waratah Capital Advisors and President, Summerhill Resorts Ltd.

Jeannine LiChong

Executive Vice President and Portfolio Manager

Adrian Wong

Vice President and Portfolio Manager

Rob Pulkys

Vice President, Trade Execution

Benjamin Thorek

Senior Analyst

Zenya Rosocha

Vice President, Operations

CAREERS

We are always looking for talented people.

We focus on hiring individuals with intelligence, dedication, integrity, and curiosity with 3-5 years of experience in investments, private equity, investment banking, investor relations, compliance, and accounting.

If you are interested, please email your resume to career@waratahcap.com for consideration.

Current Openings

[Investment Analyst](#)

INSIGHTS

Waratah clients receive access to frequent communications about our holdings, positioning, and investment philosophy.

Limited Information is available on our website. If you are interested in receiving frequent communication, please **contact us**.

Electrification of Transportation

Blair Levinsky

Brad's Musings

Brad Dunkley

Quarterly Letter

Q4 2018

Annual Conference Call

January 2019

AWARDS

WARATAH ONE

Market Neutral

Best 5 Year Sharpe Ratio,
Winner, 3rd Place – 2018*

WARATAH ONE

Market Neutral

Best 5 Year Sharpe Ratio,
Winner, 1st Place – 2017*

WARATAH ONE

Market Neutral

Best 5 Year Return,
Winner, 3rd Place – 2017*

WARATAH ONE

Market Neutral

Best 1 Year Return,
Winner, 3rd Place – 2017*

*For more information visit
<http://alternativeiq.com>

SOCIAL IMPACT

Environmental, Social and Governance (ESG) impacts have become integral to business and a Waratah value.

Alternative ESG Fund

Global long/short strategy integrating **ESG factors** in its investment process to identify inadvertent risk and new investment opportunities, while maintaining a positive ESG score for the entire portfolio.

[VIEW THE STRATEGY](#)

Lithium Royalty Corp.

LRC was formed on the investment thesis of a once in a hundred year investment opportunity – the Electrification of Transportation.

[VIEW THE STRATEGY](#)

Waratah Action Committee

We believe in giving back to the community to create meaningful change.

[LEARN MORE](#)

WARATAH ACTION COMMITTEE

Through this program, Waratah and its employees are able to dedicate their time and resources to numerous initiatives within the communities where we do business.

Capitalize for Kids – Bay Street Challenge

June 2019

The Waratah team participated in the Capitalize for Kids - Bay Street Challenge and raised over \$7500 to support kids' mental health. The Bay Street Challenge is the ultimate fitness competition where teams compete in a series of challenging athletic events and raise money for kids' mental health.

True Patriot Love

April 2019

Jessica Clark-Barrow, Co-Chair of Women's True Patriot Love Baffin Island. The 10th Arctic Circle paired veterans with business leaders to promote health and raise \$1 million to support military families.



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About

Strategies

Who We Are

Market Neutral

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- [Waratah One X](#)
- [Long Biased](#)
- [Waratah Income](#)
- [Waratah Performance](#)
- [Specialty](#)
- [Waratah AESG](#)
- [Lithium Royalty Corp.](#)

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OKAY