

Portfolio intelligence

Actionable innovation

At Varick Asset Management, we partner with our clients to create investment solutions designed to address the challenges of traditional asset allocation.

Commonly used portfolio optimization techniques rely on normally functioning financial markets and stable correlations among assets and sectors. Markets, however, have proven to be unpredictable, and performance outliers can derail even the most carefully crafted portfolios.

Varick offers a range of strategies to help address these issues in an effort to enhance our clients' overall risk-adjusted returns.

Practical solutions

Varick's product suite is designed to help increase the probability that client portfolios effectively meet their objectives. Our investment strategies seek to address two critical areas. First, protect clients from the uncertainties embedded within their core investments. Second, enhance portfolio diversification by introducing an expanded range of investment opportunities.

Protect + Enhance

- SEEK TO PROTECT CORE ALLOCATIONS WITH VARICK EQUITY OVERLAYS
- SEEK TO ENHANCE PORTFOLIO DIVERSIFICATION WITH VARICK STRUCTURAL ARBITRAGE STRATEGIES

Equity overlays

Varick's equity overlays seek to reduce the risks embedded in existing equity allocations. These actively managed strategies employ listed options and are implemented using a systematic investment process.

OBJECTIVES

- Limit downside risk of equity holdings
- Avoid the need to change current asset allocations or managers
- Potentially monetize market volatility
- Retain transparency and liquidity

Structural arbitrage

Varick's structural arbitrage strategies seek to provide our clients with exposure to an expanded range of investment opportunities without many of the drawbacks associated with alternative investments.

OBJECTIVES

- Enhance alternative investment access
- Offer portfolio diversification benefits
- Offer tax and regulatory benefits
- Potentially reduce capital requirements

Varick | Asset Management

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Varick | Asset Management

Capabilities Overview

PRESENTED TO
Allianz Global Investors
October 6, 2010



Carr Communications NYC can help you communicate your brand value proposition with compelling positioning content and strong, functional design visuals. For Varick Asset Management, we developed a full suite of basic brand marketing components, from company logo, business papers and PowerPoint slide templates to investment capabilities brochure and firm website.