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William Kavalier



Mr. Kavalier is a leading distressed and event-driven investor, portfolio manager and analyst.

At the Litespeed Master Fund, Mr. Kavalier was responsible for sourcing, developing, researching and modelling a broad range of equity and credit investments for the Fund. He was instrumental in managing the fund investments from conception to realization. He has actively participated in distressed restructurings, refinancings and activist campaigns. He combines a deep fundamental value with catalyst-driven investing.

Prior to Litespeed, Mr. Kavalier held prominent positions at Seaport Global, Inc., where he was a Managing Director; Olivetree Financial (Managing Director); and Oscar Gruss and Son, a leading risk arbitrage and event-drive boutique brokerage. His career also included managing significant proprietary investment portfolios for Societe Générale and Commerzbank, leading European banks. In his roles at Soc Gen and Commerz, he demonstrated his proficiency as a portfolio manager, team leader and risk-manager.

Mr. Kavalier holds a BA in Comparative Literature from Columbia College, Columbia University.

Industry experience

Litespeed Fund Multi-Asset Class Event-Driven Investor	2018–Present
Seaport Global, Inc. Managing Director, Event Driven Group	2016–2017
Olivetree Financial Group Managing Director, Event Driven Group	2013–2016
Oscar Gruss and Son Senior Analyst, Event-Driven, Distressed and Special Situations	2010–2012
Paige Capital Senior Analyst, Consultant	2009–2010
Societe Générale Proprietary Investments	2005–2008
Tykhe Consultant	2004
Commerzbank AG Global Head Proprietary Trading	1998–2004
B Laternan and Co. Event-driven hedge fund	1995-1998
BDS Securities Distressed trading firm/brokerage	1992-1995
Herzog Heine Geduld NASDAQ market maker/broker dealer	1985-1991

Areas of expertise

Fundamental Investment:

- + Deep fundamental research
- + Financial modeling
- + Catalysts, industry dynamics

Event & Special Situations:

- + Merger & acquisitions (M&A), hostile bids, shareholder activism
- + Break-ups/spin-offs
- + Distressed assets, bankruptcy
- + Corporate and capital structure
- + Complex event-driven scenarios

Portfolio Management:

- + Idea sourcing, risk/reward assessment
- + Client presentations
- + Portfolio construction, asset allocation, risk management

Trading:

- + Order execution, trade structuring, liquidity management
- + Equities, options, volatility trading, corporate debt, convertible bonds
- + Hedging

Keywords:

Financial modeling, fundamental investing, catalysts, valuations, deep value, strategic reviews, credit-related trades, distressed assets, industry dynamics, merger arbitrage, event-driven arbitrage, corporate meetings, industry consultations, hostile transactions, spinoffs, distressed/reorganizations, turnarounds, pre-deal situations, corporate and capital structures, corporate documents, bankruptcy, client presentations, idea sourcing, risk/reward assessment, asset allocation, global investment, risk management, order execution, trade structuring, liquidity management, equities, options, corporate debt, convertible bonds, volatility trading, portfolio construction, hedging, FINRA Series 24 Principal.

[NOT RETAINED]