



## 2023 NAAIM Active Investing Strategy Competition

### [LINK TO APPLICATION](#)

Each year, the National Association of Active Investment Managers (NAAIM) hosts competitions to seek out the best actively managed investment strategies. The competition was launched in 2013 to provide an opportunity for managers to showcase their active investment strategies, models, and signals and to provide membership with opportunities to develop relationships with other active managers.

### 2023 Competition Categories

NAAIM's Active Investing Strategy competitions are category specific. 2023 categories include, but are not limited to: Stock Selection; Tactical Allocation; Asset Allocation; Fixed Income; and Alternatives

### Competition Dates:

Preliminary Online Competition:

February 1 – March 31, 2023

Finals – In-Person -- May 7, 2023

(Uncommon Knowledge), Scottsdale, AZ

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### Competition Structure:

There are two rounds of competitions: Preliminary and Final. Each competitor will be given 7 minutes to present their strategy. In the preliminary round, a question-and-answer period with NAAIM committee members will follow the presentation. In the final round, the Q-and-A session will include judges and audience.

The winners of the Preliminary Strategy Competition will be selected by the NAAIM Active Investing Strategy Competition Committee and will advance to the Final in-person competition in May at Uncommon Knowledge 2023. The Grand Prize winner of the Final round will be selected by the NAAIM AISC committee and a panel of outside judges.

### [Grand Prize Package:](#)

**Live Distribution and Promotion on TAMP Offering\***

**Promotion to NAAIM Membership**

**Cash Prize – up to \$5,000**

The grand prize winner will receive access to Global View Capital Advisors' platform. Global View Capital Management's tamp offering focuses on active investment managers, and

\*pending due diligence approval, the winning strategy will be promoted to Global View's advisor base.

**Who May Participate:** The NAAIM Active Investing Strategy competitions are open to all trading and investing practitioners who have developed strategies with **live, verifiable, real money track records**. Note that NAAIM Membership is required to participate in the live NAAIM Active Investing Strategy Competition in Scottsdale, AZ.

**How to Apply:** Managers wishing to participate in the upcoming event are requested to apply to the committee.

[LINK TO APPLICATION](#)

**Winning finalists will be announced on or before April 3, 2023**

**Questions?** Contact NAAIM at [info@naaim.org](mailto:info@naaim.org)

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#### **Past Winners on Their AISC (NAAIM Shark Tank) Experience:**

##### **1st Place Winner – 2018 | David Moenning, Chief Investment Officer, Heritage Capital Research**

"I can't say enough about the NAAIM Shark Tank Strategy Competition or the NAAIM community in general. Having recently left a CIO position at a large RIA firm, I was looking for an opportunity to showcase my new consulting service. The strategy I presented to the Shark Tank was very well received and within 6 months of the competition, I had acquired 8 new business relationships. I am pleased to report that my services are now promoted on 4 multi-manager platforms and I have a multitude of advisors to work with. I would encourage anyone looking to promote their business to participate in the NAAIM Shark Tank Strategy Competition."

##### **1st place winner – 2017 | Rich Paul, President, Potomac Advisors**

"I entered the Shark Tank for the 2015 competition. I had sold my prior company years earlier but had a non-compete until 2014 when I sold my remaining shares and decided to take my 12-year EVO trading system and track record to the Shark Tank challenge. After placing third, my assets began to grow substantially, even before winning the competition last year. Today our assets primarily through licensing, using just the EVO strategy, have grown to \$370m. I have to credit my participation in the Shark Tank for the exposure in getting to this level."

##### **1st place winner – 2016 | David Bush, Managing Member, ALPHATATIVE LLC**

"Winning NAAIM's Shark Tank strategy competition has been invaluable on many levels. As a manager previously immersed solely in the hedge fund world, joining NAAIM opened several new avenues of opportunity I simply hadn't been aware of before. Additionally, the community of fellow tactically-oriented managers willing to share ideas and resources was a truly welcome surprise. Without question, the Shark Tank victory has helped my business grow, and I believe that my continued association with NAAIM will only help further the future growth of my business."

#### **About NAAIM:**

The National Association of Active Investment Managers (NAAIM) is a non-profit trade group of nearly 135 registered investment advisor firms that collectively manage more than \$15 billion in assets. NAAIM member firms provide active money management services to their clients to produce favorable risk-adjusted returns as an alternative to passive, buy-and-hold investment strategies. NAAIM publishes the weekly NAAIM Exposure Index and sponsors the annual Uncommon Knowledge conference along with smaller conferences and regional workshops on topics of interest to its membership. For more information, visit [www.naaim.org](http://www.naaim.org).