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Julex Capital Management Launched By Professionals With Insurance Investment Expertise

(IAM Editorial Desk)

March 5, 2013

BOSTON, MA - The launch of a new investment management firm, Julex Capital Management, LLC, was announced today by three industry veterans with extensive experience in managing insurance company assets.

The founder of Boston-based Julex is Henry Ma, a former hedge fund manager at Geode Capital Management, with prior experience at Loomis Sayles, Fortis Investments, Sun Life Financial and John Hancock Financial.

Ma's partners are Tony Ash, who previously worked as head of US portfolio management at Sun Life Financial, and Brian Phelan, a former director of institutional sales at PaineWebber and Deutsche Bank.

Julex will be specializing in managing ETF portfolios that offer "outcome-oriented and solution-based dynamic investment strategies such as risk-managed equities, enhanced income, inflation

protection, absolute return and global multi-asset portfolio solutions.”

To meet these objectives, Ma has developed a quantitative asset/sector allocation model and 3-step investment process that attempts to reduce risks and preserve capital when the markets are weak while providing attractive returns when the capital markets are stronger.

“In the current challenging environment,” Ma commented, “investors are looking for solutions to achieve specific outcomes. Outcomes are the new alpha in this new normal world.”

“Based on our backgrounds here at Julex,” added Ash, “we have integrated the best of hedge fund investment management and insurance company risk management into one.” (IAM News)

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