

Foundations for the Future



Conference
Starts at
10:30 AM



Dinner
Starts at
5:30 PM



UCI Beall Applied
Innovation @ The Cove

5270 California Ave
Irvine, CA 92617



Marea Terrace at
VEA Newport Beach

900 Newport Center Dr
Newport Beach, CA 92660



Tuesday, Aug 11, 2026

Featured Discussion Topics



DATA CENTERS & AI INFRASTRUCTURE

Examining the infrastructure needed in a world of AI



A NEW GEOPOLITICAL BACKDROP

Exploring the changes in today's global order



UTILIZING AI IN FINANCE

A closer look at leveraging AI tools in finance



DE-RISKING HEALTH

Understanding the impact of GLP-1 drugs in today's healthcare landscape

Agenda

10:30-11:00	_____	Guest Arrival
11:00-11:10	_____	Welcome Cynthia Tusan
11:10-12:30	_____	Data Centers & AI Infrastructure Michael Gianatasio, Mark Matossian Panel Moderator: Richard Sloan
12:30-1:30	_____	Lunch
1:30-2:30	_____	A New Geopolitical Backdrop Mona Yacoubian Panel Moderator: Cynthia Tusan
2:30-2:45	_____	Break
2:45-3:15	_____	Utilizing AI in Finance Quang Ngu
3:15-4:45	_____	De-Risking Health Brett Darragh, Jonathan Watanabe Panel Moderator: Cherie Badri
4:45-5:00	_____	Closing Remarks Cynthia Tusan
5:30	_____	Dinner Marea Terrace at VEA Newport Beach

SGA Speakers



MICHAEL GIANATASIO

FUNDAMENTAL ANALYST

Mr. Gianatasio joined SGA in 2025 and is a Fundamental Analyst. His responsibilities include performing fundamental reviews of new ideas generated by the quantitative model. Most recently, he was an equity analyst at Schonfeld Strategic Advisors in New York, where he primarily focused on the industrial sector. Prior to Schonfeld, he was an equity analyst at Causeway Capital Management in Los Angeles. He began his career as an investment banking analyst at Barclays in New York. Michael received his B.A. in Business, Entrepreneurship, Organizations from Brown University.



QUANG NGU, CFA

SENIOR QUANTITATIVE ANALYST

Mr. Ngu joined SGA in 2020 after previously being an intern at the firm, where his focus was on expanding the functionality of our simulation platform. His on-going responsibilities include portfolio optimization and the researching of alpha signals and risk factors. Prior to joining the firm, Mr. Ngu was a lead engineer at the Boeing Company for over a decade, where he specialized in quantitative modeling and simulation, research and software development within Boeing's Satellite Division. Mr. Ngu earned his BS in Electrical Engineering from the University of Hawaii at Manoa, a MS in Electrical Engineering and an MBA from the University of California at Los Angeles (UCLA), and a Master of Financial Engineering (MFE) from the University of California Berkeley (UCB).



BRETT DARRAGH, CFA

SENIOR FUNDAMENTAL ANALYST & ASSOCIATE PORTFOLIO MANAGER

Mr. Darragh joined SGA in 2019 and is a Senior Fundamental Analyst and Associate Portfolio Manager. His responsibilities include performing fundamental reviews of new ideas generated by the quantitative model and portfolio management. Most recently, he was an equity research associate at Northland Securities in Newport Beach, CA, where he primarily focused on the energy sector. Prior to Northland Securities, he was an associate financial analyst at TCW and Space Systems Loral. Brett received his BS in Business Administration from Cal Poly San Luis Obispo and is a member of the CFA Society of Orange County.

Guest Speakers



MARK MATOSSIAN, PhD

Mark Matossian, PhD, is the Co-Founder and Chief Technical Officer of Lonestar Data Holdings Inc. as well as Founder and Managing Partner of Whipsmart Ventures, a venture capital fund focused on space and deep tech investing. He is an aerospace engineer with a Ph.D. in operations research and optimization who spent 13 years managing projects at Google before leading Iceye U.S., where he oversaw program management and satellite production and launch for Terra Bella. Dr. Matossian serves as an advisor and board member of Solstar. He holds degrees in Aerospace Engineering and Russian & Eastern European Studies from the University of Michigan and a Ph.D. in Aerospace Engineering from the University of Colorado Boulder.



MONA YACOUBIAN

Mona Yacoubian is director and senior adviser of the Middle East Program at the Center for Strategic and International Studies (CSIS). She has more than thirty years of experience working on the Middle East and North Africa, with a focus on conflict analysis, governance and stabilization challenges, and conflict prevention. She was previously vice president of the Middle East and North Africa Center at the U.S. Institute of Peace (USIP), where she managed field programming in Iraq, Libya, and Tunisia as well as Washington, D.C.-based staff. In 2019, she served as executive director of the congressionally appointed Syria Study Group. From 2014 to 2017, Yacoubian served as deputy assistant administrator in the Middle East Bureau at the U.S. Agency for International Development (USAID), where she had responsibility for programming across Syria, Jordan, Lebanon, and Iraq. Prior to joining USAID, Yacoubian was a senior adviser at the Stimson Center and a special adviser on the Middle East at USIP. From 1990 to 1998, Yacoubian served as the North Africa analyst in the Department of State's Bureau of Intelligence and Research. Her opinion pieces have appeared in the New York Times, Foreign Affairs, Foreign Policy, and various other outlets, and she has testified to Congress six times. Yacoubian was a Fulbright scholar in Syria, where she studied Arabic at the University of Damascus from 1985 to 1986. She has held an international affairs fellowship with the Council on Foreign Relations (CFR) and is a CFR member. She earned a master's in public administration from Harvard University's Kennedy School of Government and a bachelor's in public policy from Duke University.



JONATHAN WATANABE, PharmD, PhD

Jonathan H. Watanabe, PharmD, MS, PhD, is a Professor in and the Chair of the Department of Clinical Pharmacy and the Jere E. Goyan Presidential Chair for the Advancement of Pharmacy at the UCSF. He is a board-certified geriatrics pharmacist, health policy investigator, and outcomes researcher focused on using real-world data to improve patient care, population health, and access while reducing medical costs. He serves as a member of the National Academies of Sciences, Engineering, and Medicine's Forum on Drug Discovery, Development, and Translation and as an appointed member of the Board of Directors of the California Geriatrics Society. Dr. Watanabe received his BS from the University of Washington, his PharmD from the University of Southern California, and his MS and Ph.D. from the University of Washington Comparative Health Outcomes, Policy, and Economics (CHOICE) Institute.

SGA Moderators



CYNTHIA TUSAN, CFA

CEO & SENIOR PORTFOLIO MANAGER

Cynthia Tusan, CFA is the Founder and CEO of Strategic Global Advisors (SGA), LLC, a woman and employee-owned registered investment advisor based in Newport Beach, California. SGA manages over \$4.2 billion in AUM + AUA as of June 30, 2026, in international, global and domestic equity strategies, primarily for institutional investors and has earned numerous awards over the years for their excellence in asset management and performance, in 2012, 2016, 2018, 2025 and 2026. She is a CFA charter holder and is a member of the CFA Society of Los Angeles and the CFA Society of Orange County. Ms. Tusan is a graduate of Bryn Mawr College and the Anderson School at UCLA. She is also co-founder and lead investor in a STEM and Arts Education Company serving thousands of elementary students across the US and Canada.



PROFESSOR RICHARD SLOAN, PhD

DIRECTOR OF INVESTMENT RESEARCH & ACADEMIC ADVISOR

Professor Sloan joined SGA's Advisory Board in 2018 and joined SGA in a consulting capacity as Director of Investment Research in 2023. As Director of Investment Research, his consulting relationship and involvement with the Fundamental and Quantitative research teams expands, leveraging his expertise in an effort to further refine SGA's investment process and incorporate new insights from academia. Professor Sloan is a professor of accounting, finance and business economics at the University of Southern California. He has also served on the faculties of UC Berkeley's Haas School of Business, University of Michigan's Ross School of Business and University of Pennsylvania's Wharton School. While at the University of Michigan, Professor Sloan was the founding director of the John R. and Georgene M. Tozzi Electronic Business and Finance Center. From 2006 to 2009, Sloan was a managing director in equity research at Barclays Global Investors (since acquired by Blackrock). Professor Sloan is a pioneer in the field of quantitative investing. He has served as a consultant to numerous firms in the investment management industry and is a frequent speaker at industry conferences. Professor Sloan holds a PhD in Accounting and Finance from the University of Rochester and a BCom(Hons) from the University of Western Australia.



CHERIE BADRI, CFA

DIRECTOR OF FUNDAMENTAL RESEARCH & SENIOR PORTFOLIO MANAGER

Ms. Badri joined SGA in 2006, where her responsibilities include portfolio management and fundamental company analysis. Ms. Badri spent over eight years as a Senior Associate Research Analyst at William Blair & Company in Chicago. Previously, she was an Analyst at Picoco in Newport Beach where she co-managed a fund focused on small-cap companies. Ms. Badri earned her BA in Economics from Northwestern University and both her MBA and MS in Finance from the University of Illinois at Urbana-Champaign. She is a CFA charter holder and is a member of the CFA Society of Orange County.

Things to Know

Contact a member of SGA's Client Service team

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Dress Code

Business sessions: Business Attire

Parking at The Cove is free

Parking at The VEA will be validated

Airports

John Wayne Airport Orange County (SNA) ~5 miles from UCI

Long Beach Airport (LGB) ~25 miles from UCI

Los Angeles International Airport (LAX) ~44 miles from UCI

Hotels

[Irvine Marriott](#) 2.0 miles from UCI (\$\$\$)

[VEA Newport Beach](#) 3.2 miles from UCI (\$\$\$)

[Hyatt Regency Newport Beach](#) 3.9 miles from UCI (\$\$\$)

[Sonesta Irvine](#) 7.1 miles from UCI (\$\$)

Important Disclosures

The attached is meant for informational purposes only and is not intended as a recommendation to invest in any particular asset class or strategy. The views and opinions expressed are those of Strategic Global Advisors, LLC and should not be construed as an estimate or a promise of results that a portfolio may achieve. The materials provided and any comments or information provided by SGA are for educational purposes only and nothing presented should be considered legal or investment advice. Information contained herein has been obtained from sources believed to be reliable, but not guaranteed.