Gideon Strategic Partners Engages Lumenai to Manage Quantitative AI-driven Investment Strategies for Gideon’s Clients

Gideon Strategic Partners (GSP) announced today that it has engaged Lumenai Investments to create customizable, alpha-seeking, separately managed portfolios.

Lumenai Investments LLC

Gideon Strategic Partners

STAMFORD, CT, USA, June 27, 2024 /EINPresswire.com/ -- Gideon Strategic Partners (GSP), a premier wealth management firm, announced today that it will engage Lumenai Investments, a quantitative and AI-based investing and reporting manager, to offer customizable, alpha-seeking separately managed portfolios to GSP clients. GSP designs tax-efficient financial plans and life insurance around the unique needs of high-net-worth individuals.

Its investment strategies focus on asset allocation and private equity, and it uses an exclusive range of alternative and passive investment products to construct tax-aware portfolios designed for maximum return with minimum risk. Lumenai is one of the first firms to offer AI-powered investment management in the US. It strives to deliver custom, index-beating portfolios that generate positive alpha without taking excess risk. Lumenai's actively managed portfolios provide a unique and complementary addition to GSP’s existing suite of investment solutions.

GSP will now offer its clients AI-powered, alpha-seeking strategies created and managed by Lumenai: 01 02 03 Gideon GO Quality Strategy – (multi-asset, quality factor, and tax loss harvesting) Gideon GO Dividends Strategy – (multi-asset, dividend factor, and tax loss harvesting) Lumenai Innovation Fund – (market neutral and tax loss harvesting) “Innovation is one of Gideon’s core values, so naturally, we would add AI-driven funds to help meet our clients’ personalized needs and goals.

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> *Robert Amoruso, CEO & Founder of Gideon Strategic Partners*

clients. They bring a rare track record of quant and AI investing, and working with them requires a minimal time commitment and no need for additional expertise, staff, or technology," said Robert Amoruso, CEO & Founder of Gideon Strategic Partners. "We're pleased to be partnering with Gideon. We believe that we add a valuable addition to their investment offering and that we'll help them perform better for their clients and contribute to the firm's ability to scale and grow," said John Bailey, Founder and CEO of Lumenai. #AIFT100 #WT100 #Lumenai

John Bailey
Lumenai Investments LLC
+1 203-807-1013
email us here
Visit us on social media:
X
LinkedIn
