

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

*Gideon Strategic Partners announced today that it engaged Lumenai Investments to offer GSP clients customizable, alpha-seeking, AI-driven investment portfolios.*

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.

“

AI will be a game-changer for investing, and Lumenai will make it easy for us to bring it to our clients.”

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

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:

1) Gideon GO Quality Strategy – (multi-asset, quality factor, and tax loss harvesting)

2) Gideon GO Dividends Strategy – (multi-asset, dividend factor, and tax loss harvesting)

3) 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. AI will be a game-changer for investing, and Lumenai will make it easy for us to bring it to our 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.

#### About Lumenai

Lumenai is an outsourced quantitative and AI-powered investing and reporting manager that wants to make active investing effortless for financial professionals. Its investment process is powered by ETS Asset Management Factory, a research and advisory firm that has specialized in quantitative and AI investing since 1987.

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#### Gideon Strategic Partners



Lumenai named to the AIFinTech100 and WealthTech100 for the second consecutive year.

## About Gideon Strategic Partners

Gideon Strategic Partners is a leading wealth management firm that provides innovative financial solutions and advisory services. Committed to integrity, excellence, and client success, it stands at the forefront of wealth management.

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