

Lumenai to Launch First Fully Agentic AI Hedge Fund

Institutional global long-short strategy designed to use autonomous AI agents operating under human governance

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[Lumenai](#) Investments LLC today announced plans to launch the

Lumenai Innovation Fund, believed to be the first institutional hedge fund built on an agentic AI architecture. The Fund is expected to begin operations on or around June 1, 2026.



In conventional quantitative funds, machine learning is embedded inside a human-directed, fixed-rules process. The Lumenai Innovation Fund inverts that structure. Autonomous AI agents are designed to originate, evaluate, and risk-manage investment ideas continuously, with human oversight focused on governance, risk supervision, and strategy. The Fund is a global equity long-short strategy with an objective of generating alpha at low beta across market regimes. These are investment objectives, not guarantees, and the Fund has no operating history.

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The architecture is built in partnership with ETS Asset Management Factory, a quantitative and AI research firm developing systematic investment models since 1987.

“Most hedge funds bolt AI onto fixed-rules systems,” said John Bailey, Founder and Managing Partner of Lumenai Investments. “We’ve inverted that. In a market where information edge has structurally collapsed, we believe the remaining edge is the adaptability of the process itself — and an agentic architecture is built for adaptation.”

“We have been applying artificial intelligence and systematic methods to financial markets for decades,” said Javier Sánchez, General Manager of ETS Asset Management Factory. “What is different about the Lumenai Innovation Fund is not that it uses AI. It is that the Fund is built on a fully agentic AI architecture from day one, with AI agents serving as decision-makers rather than

as a tool inside a broader process.”

The fund is designed as a non-correlated diversifier to traditional stock and bond portfolios.

About Lumenai Investments

Lumenai Investments LLC is a Stamford, Connecticut-based quantitative and AI-driven investment manager focused on market-neutral, long-short, and multi-asset strategies for family offices, advisors, and institutional investors. The firm has been recognized in the global AI FinTech 100 and WealthTech 100. More information is available at www.lumenai.ai.

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Important Disclosures

Forward-Looking Statements. This release contains forward-looking statements regarding the Fund’s planned strategy, objectives, structure, and launch date, identifiable by words such as “believe,” “expect,” “anticipate,” “target,” “plan,” “intend,” “seek,” “estimate,” or “may.” These statements reflect current expectations and assumptions as of the date of this release. Actual results, performance, launch timing, and Fund terms may differ materially due to market conditions, regulatory factors, operational considerations, model performance, and other risks. Lumenai undertakes no obligation to update forward-looking statements.

No Operating History. No Performance Shown. The Lumenai Innovation Fund is newly formed and has no operating history. Investment objectives described herein are targets, not guarantees or projections of future performance. There is no assurance the Fund will achieve its stated objectives or avoid substantial losses. No performance data is presented in this release, and none should be inferred. Investment in the Fund involves significant risks, including the possible loss of all or a substantial portion of principal.

Use of Artificial Intelligence and Autonomous Agents. The Fund’s investment process relies on quantitative models, machine learning systems, and autonomous AI agents to generate, evaluate, combine, and monitor investment ideas. The use of these technologies involves risks that differ from traditional discretionary or rules-based investment approaches. These risks include, but are not limited to: model error, data bias, unintended agent behavior, overfitting, regime change outside the training distribution, infrastructure or system failures, cybersecurity vulnerabilities, and the evolving nature of AI regulation. The description of “autonomous AI agents” refers to software systems that operate within predefined objectives and constraints under human governance and supervision; it does not imply that the Fund’s investment decisions are unsupervised or that AI systems possess judgment, intent, or infallibility. Human portfolio managers and risk personnel retain ultimate responsibility for Fund oversight.

“First” Claim. The statement that the Fund is “believed to be the first institutional hedge fund built on an agentic AI architecture” reflects Lumenai’s reasonable belief based on its review of publicly available fund filings, industry databases, and press reports as of the date of this release. Lumenai makes no representation that no other fund or manager employs comparable architecture, and this statement should not be relied upon as a verified claim of industry primacy.

Track Record Clarification. References to ETS Asset Management Factory’s experience, personnel, data infrastructure, and historical activities relate solely to ETS’s own operations and do not represent the performance, capabilities, or track record of the Lumenai Innovation Fund or Lumenai Investments LLC. The Fund has no performance history.

Offering Restrictions. The Lumenai Innovation Fund is organized as a Delaware limited partnership and is not currently accepting investments or subscriptions. This announcement is for informational purposes only and does not constitute an offer to sell, or a solicitation of an offer to buy, any securities or any interest in the Fund. Any future offering will be made solely to qualified purchasers as defined under the Investment Company Act of 1940 and accredited investors as defined under Rule 501 of Regulation D, pursuant to a confidential private placement memorandum that will contain complete information regarding the Fund, including risks, fees, expenses, conflicts of interest, and investment terms. In the event of any inconsistency between this release and the private placement memorandum, the private placement memorandum will control. Interests in the Fund have not been, and will not be, registered under the U.S. Securities Act of 1933 or applicable state securities laws.

Third-Party Content and Recognitions. Industry recognitions, rankings, and list inclusions referenced in this release reflect the methodologies of the issuing organizations and are not indicative of Fund performance. Lumenai does not pay for award nominations. Information regarding awards and the criteria used is available upon request from Lumenai’s Chief Compliance Officer.

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