

Event - auto Selective - Demo Company

Date	Company participants	
02. Nov 2024	Alina Corporate (Test)	+41 76 789 45 55
Location		
Geneva	Event coordinators	
Shares covered	Alina Corporate (Test)	+41 76 789 45 55
100.5 %		

02. Nov 2024

🕒 09:00 - 10:00 CET / 08:00 - 09:00 GMT

Location

Geneva

Meeting type

1:1 virtual

Conference info

Zoom meeting ID: 1234567890

Join meeting by URL: <https://pwa.zoom.us/jc/1234567890>

Company representatives

Alina Corporate, Test

Attendants

Alina Investor	Leonteq AG	Lviv	+ 41 456 78 99	shareholder
Anna Gerry		Unknown city	No phone	
Anita FirstRe	Carter, Prohaska and O'Connell	Unknown city	No phone	
Anita Second	Tillman, Cummerata and Runolfsdottir	Unknown city	No phone	
Somi Kruk		Unknown city	No phone	
Susi Sem		Unknown city	No phone	

Participants

Alina Investor	Leonteq AG	Portfolio Manager	test	shareholder
Anna Gerry	-	Private Investor		
Anita FirstRe	Carter, Prohaska and O'Connell	Portfolio Manager		
Anita Second	Tillman, Cummerata and Runolfsdottir	Client Advisor (EAM, Bank)		
Somi Kruk	-	Private Investor		
Susi Sem	-	Private Investor		

# Alina Investor

## Company background

Company name	Leonteq AG
Company type	Institutional Asset Manager
Company description	-
Company total AuM (scheduled bracket for filtering)	> CHF 50m [might be scheduled estimate]
Company total AuM (company disclosure, optional)	-

## Demo Company's comments on Leonteq AG

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Created by Alina Corporate at 06. Jun 2024 10:56:52

## Investor Background & Investment style

Name	Alina Investor
Function	Portfolio Manager
Company role	test
Public Profile	<a href="https://www.google.com/">https://www.google.com/</a>
Personally managed AuM (scheduled bracket for filtering)	-
Personally managed AuM (optional disclosure)	-
Products / mandates managed	new fund
Investment Style	qqqq
Possibility to hedge / go short	No
Positive Investment Trigger	-
Negative Investment Trigger	-

## Investor Interests / filters

Asset classes	Equities
Sectors	Oil & Gas, Basic Materials, Industrials, Consumer Goods, Health Care, Consumer Services, Telecommunications, Utilities, Financials, Technology, ESG / Sustainability
Market cap	Micro Cap (< CHF 200m), Small Cap (CHF 0.2bn - CHF 1.5bn), Mid Cap (CHF 1.5bn - 8bn), Large Cap (> CHF 8bn)
Minimum liquidity	CHF 1m/day
Countries/regions	Western Europe (Germany, Switzerland)
Roadshow locations	

## Demo Company's tags on investor

Priority 3

## Interaction log with investor (last 10)

Time stamp	Meeting Type	Event/Subject	Company Participants	Duration	Quality
02/11/2024	1:1 virtual	Event - auto Selective	Alina Corporate	60 min	n/a
01/11/2024	1:1 live	Event - auto disabled	Alina Corporate	60 min	n/a
30/10/2024	1:1 live	Event with all type of slot (copy) Event with all type of Ev	Alina Corporate	60 min	n/a
22/10/2024	1:1 virtual	Event with all type of slot	Wanda Abbott, Alina Corporate, Andrew Martynyuk, Amara Reilly	60 min	n/a
15/10/2024	1:1 virtual	Event with Zoom meeting type	Amara Reilly	120 min	n/a
13/10/2024	1:1 virtual	Event with Webinar type	Korbin Hanee, Vinnie Yost	60 min	n/a
12/10/2024	1:1 virtual	Event with Phone/online type	Wanda Abbott, Alina Corporate	45 min	n/a
11/10/2024	Group live	Event with Other meeting type	Cayla Koelpin, Andrew Martynyuk, Amara Reilly, Caren Denny, Admin Super, Sindi Clone	60 min	n/a
24/09/2024	1:1 virtual	Test webinar -> view page	Alina Corporate, Amara Reilly	2 min	n/a
15/09/2024	1:1 live	Investor day online September	Cayla Koelpin, Wanda Abbott, Alina Corporate	60 min	n/a

## Anna Gerry

### Investor Background & Investment style

Name	Anna Gerry
Function	Private Investor
Public Profile	-

### Investor Interests / filters

Asset classes	Equities
Sectors	Telecommunications
Market cap	Micro Cap (< CHF 200m)
Minimum liquidity	CHF 20m/day
Countries/regions	Western Europe (Switzerland)
Roadshow locations	

### Interaction log with investor (last 10)

Time stamp	Meeting Type	Event/Subject	Company Participants	Duration	Quality
02/11/2024	1:1 virtual	Event - auto Selective	Alina Corporate	60 min	n/a
01/04/2024	1:1 virtual	Test 2024	Cayla Koelpin, Alina Corporate, Rickey Quitzon, Neal Crona, Dorothy Fisher, Rowena Roberts	60 min	★★★★

## Company background

Company name	Carter, Prohaska and O'Connell
Company type	Family Office
Company description	Carter, Prohaska and O'Connell is a North Penelope-based company that has been listed on the stock exchange for over 24 years. The company sees itself as an international specialist in engineering services. In addition to very attractive offshore projects, for example in the North Sea, Carter, Prohaska and O'Connell also regularly develops nuclear power plants worldwide.
Company total AuM (scheduled bracket for filtering)	not disclosed [might be scheduled estimate]
Company total AuM (company disclosure, optional)	-

## Investor Background & Investment style

Name	Anita FirstRe
Function	Portfolio Manager
Company role	-
Public Profile	-
Personally managed AuM (scheduled bracket for filtering)	-
Personally managed AuM (optional disclosure)	-
Products / mandates managed	
Investment Style	-
Possibility to hedge / go short	-
Positive Investment Trigger	-
Negative Investment Trigger	-

## Investor Interests / filters

Asset classes	
Sectors	
Market cap	
Minimum liquidity	CHF 0.2m/day
Countries/regions	-
Roadshow locations	

## Interaction log with investor (last 10)

Time stamp	Meeting Type	Event/Subject	Company Participants	Duration	Quality
02/11/2024	1:1 virtual	Event - auto Selective	Alina Corporate	60 min	n/a

## Anita Second

### Company background

Company name	Tillman, Cummerata and Runolfsdottir
Company type	Institutional Asset Manager
Company description	Tillman, Cummerata and Runolfsdottir is a Dillanbury-based company that has been listed on the stock exchange for over 690 years. The company sees itself as an international specialist in engineering services. In addition to very attractive offshore projects, for example in the North Sea, Tillman, Cummerata and Runolfsdottir also regularly develops nuclear power plants worldwide.
Company total AuM (schedulR bracket for filtering)	> CHF 3bn [might be schedulR estimate]
Company total AuM (company disclosure, optional)	~CHF 6bn

### Investor Background & Investment style

Name	Anita Second
Function	Client Advisor (EAM, Bank)
Company role	-
Public Profile	-

### Investor Interests / filters

Asset classes	
Sectors	
Market cap	
Minimum liquidity	CHF 0.2m/day
Countries/regions	-
Roadshow locations	

### Interaction log with investor (last 10)

Time stamp	Meeting Type	Event/Subject	Company Participants	Duration	Quality
02/11/2024	1:1 virtual	Event - auto Selective	Alina Corporate	60 min	n/a

## Somi Kruk

### Investor Background & Investment style

Name	Somi Kruk
Function	Private Investor
Public Profile	-

### Investor Interests / filters

Asset classes	Equities
Sectors	Telecommunications
Market cap	Micro Cap (< CHF 200m)
Minimum liquidity	CHF 20m/day
Countries/regions	Western Europe (Switzerland)
Roadshow locations	

### Interaction log with investor (last 10)

Time stamp	Meeting Type	Event/Subject	Company Participants	Duration	Quality
02/11/2024	1:1 virtual	Event - auto Selective	Alina Corporate	60 min	n/a



## Susi Sem

### Investor Background & Investment style

Name	Susi Sem
Function	Private Investor
Public Profile	-

### Investor Interests / filters

Asset classes	
Sectors	
Market cap	
Minimum liquidity	CHF 0.2m/day
Countries/regions	-
Roadshow locations	

### Interaction log with investor (last 10)

Time stamp	Meeting Type	Event/Subject	Company Participants	Duration	Quality
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No interaction logs yet