



## Emerging Manager Roundtable – Spring 2026

### Summary

We are looking to invite ~6-7 new/now launching/soon to launch emerging manager stockpickers to participate in an emerging manager event at MIT spanning two full days and one morning in May 2026.

Day one will be a full day discussing investment and firm building topics relating to being an emerging manager. This day will include a small group of ~6-7 new emerging managers, joined by several members of the investment team at MITIMCo, including me (Joel), as well as one of MIT's early emerging managers who has successfully compounded capital and grown their business over a decade.

Day two will be our MITIMCo "Community Day," where the invited emerging managers will get the opportunity to get to know 15-20 of MITIMCo's current investment manager partners. Last year's program included a private Q&A with an investor with a 40 year compounding record, a public company CEO with a \$200 billion market cap that has appreciated nearly 10x since its IPO less than five years ago, an presentation by an MIT professor on his research, many coffee breaks for individuals to connect with other participants, and an informal dinner out that included other Boston-based investors and CEOs, providing further learning and networking opportunities. **The event will thus provide ample opportunity for the selected emerging managers to learn from each other, from MITIMCo's formerly-emerging-and-now-established emerging managers, and from the MITIMCo team as well.** Feedback from last year's attendees highlighted the quality of the off-the-record investment and MIT content, as well as networking and mentorship connections made at the event. As one long-time MITIMCo investment manager partner put it, *"the quality of the speakers was absolutely world class - you could sell tickets! The audience were also all great energy, friendly and smart people. If every day was like that we would all be a lot smarter and happier."*

To further the value-add opportunities at this year's event, in addition to programming similar to the above, we will invite the co-founder of executive interview and research service InPractise to join the event, and all participants in the event will have the option to sign up for an InPractise subscription and/or call package at a preferred rate. MITIMCo is a happy customer, partner, and investor of InPractise, and dozens of MITIMCo's managers, ranging from emerging to established, are clients. To learn more visit [www.inpractise.com](http://www.inpractise.com)

### Details

Who:

- Goal is to create a small group (~6-7 participants) of likeminded, high quality emerging manager stockpickers with aligned visions where cross-learnings amongst the group, and with MIT's emerging manager knowledge, will be maximized.
- Criteria for selection
  - **Public stockpickers – must be long only or very long biased**
    - *Note: MIT also invests in many other types of managers, but the above type of managers is the type I have the most experience with personally, and having*

*managers who are more similar to each other in terms of strategy will make sure content is relevant to all participants*

- **Must 1) have started an investment partnership in the last ~1 year or 2) actively be starting a partnership now or 3) already plan to start one in the next 4 months and are taking steps to do that**
  - *Note: I say “starting an investment partnership” in a broad and metaphorical sense – it does not need to actually be a legal partnership like a fund – separate accounts or other structures would count too*
- **Open to any geography – we are particularly interested in having attendees from outside the United States**
- You need to be at a point where you have already written down a lot of what you plan to do, and send it to me, so that I can choose a group of high quality recent and soon-to-be managers with similar visions, goals, and challenges.
  - More detail on requested materials in a section below
- Managers who are very ambitious but want to make their money through long duration risk-adjusted compound returns not through building a fee-generating asset management business.
- **Goal to have diversity amongst the group** (by professional/personal background/experiences – non-traditional backgrounds are very welcome as long as investment acumen is visible) in addition to common ground (long only stockpickers). This is not meant to create cookie-cutter emerging managers – quite the opposite.
- Last year we received hundreds of applications. There will undoubtedly be high quality applications I have to pass up in order to keep the group small, and to optimize for fit/similarity of vision and fit with what resources I am able to offer. I apologize in advance for this. I hope that since you should only apply if you already have your investment philosophy/materials written down, the cost of applying and not being selected will be low.

What:

- In-person get-together at MITIMCo
- Structured and unstructured time – meet and greet lunch, afternoon session, group dinner
- As much for emerging managers to learn from each other (who, if I selected correctly, will be undertaking similar steps with similar goals) as from MIT, but I (Joel) will answer questions and give advice/feedback where possible
- Day one indicative agenda:
  - Breakfast and introductions
  - Emerging manager group introductions
  - Morning session on emerging manager topics
  - Lunchtime speaker and Q&A with a MITIMCo manager we partnered with as an emerging manager who has scaled
  - Afternoon session on emerging manager topics
  - Cocktail hour with the MITIMCo team
  - Dinner out with emerging manager group + MITIMCo team
- Day two indicative agenda:
  - Informal meet and greet
  - MIT professor presentation and Q&A on their groundbreaking research
  - Lunchtime speaker and Q&A with an investor with 20+ years of successful investment experience
  - Coffee break and extended time for mingling
  - Afternoon speaker: public or private company owner-operator CEO

- Break
- Dinner with emerging manager group, current MITIMCo investment manager partners, CEOs, and MITIMCo friends
- Day three agenda
  - Breakfast, debrief and discussion of takeaways with emerging manager group
  - Session on primary research with founder of InPractise

When:

- **Applications due by soft deadline of February 8, 2026** (hard deadline February 15)
- Roundtable event in person at MIT, **May 20-22, 2026** (plan on 3 nights and 2.5 days)

Process and notes

- I will publicly share this opportunity to allow for out-of-network participants, but also allow for referrals
- To apply, please email [EmergingManagerRoundtable2026@mitimco.org](mailto:EmergingManagerRoundtable2026@mitimco.org) with the below requested application materials. If you know someone I also know, feel free to have them recommend you to me as well.
- To recommend someone (if you and me or another member of the MITIMCo team actually know each other), please send this brochure to them and also send me an email sharing a paragraph (or at least a few sentences) about how you know them and why you think highly of them
- Please do not apply with any expectation that MIT will fund you as an emerging manager. We make very few emerging manager investments each year. The goal of this roundtable is to provide non-financial assistance to emerging managers. That said, part of my goal here is to meet additional people that might be a fit for MIT's portfolio.
- Our general expectation is that you will pay your own flights and lodging to attend. If paying for your attendance would be very burdensome for you, we are happy to discuss options to cover the cost so that it does not prevent a highly deserving aspiring emerging manager from attending.

Application materials:

- No specific requirements for investment materials, but should include detailed writings on how you invest, your professional background and investing qualifications, your vision for your investment business, investment write ups if applicable, etc (points for being both concise AND compelling!). A brief cover letter about yourself and why you are interested in the event is also helpful.
- To be clear, the expectation is not that you spend a lot of incremental time putting together materials – you should be able to leverage the investor materials you have already put together to help potential investors understand your strategy.

Other Testimonials:

“The chance to chat with Joel and his team about my fund launch, whether over dinner, during cocktail hour, or just on a walk, was incredibly helpful. They listened closely and gave thoughtful answers that cleared some key questions I had.”

“The event gave me further confidence to trust myself and run my fund and invest based on what makes sense to me – NOT based on ‘industry best practices’ or what I think future investors might think.”

“I think every part of the roundtable was incredibly helpful. Getting together with peers who are all going through similar things and working through issues together, and hearing how other smart investors take on certain situations was really beneficial.”