Hyperion Asset Management
Team Bios

Mark Arnold
Lead Portfolio Manager, CIO & Managing Director
CFA, B.Com, LLB, CA, SF Fin

Mark has been a substantial contributor to the investment returns Hyperion has achieved since its inception in 1996. He is an original member of the Hyperion investment team and a founding shareholder. He was the key architect of Hyperion's proprietary investment process including its portfolio management system that has underpinned the investment returns Hyperion has achieved since its establishment in the 1990s. He was instrumental in establishing the organisational culture, values and beliefs that have underpinned Hyperion's long-term success.

Mark is the Chief Investment Officer and Managing Director of Hyperion. He is the most senior and experienced Portfolio Manager in the investment team and has the most influence over Hyperion's investment decision making. Mark is Lead Portfolio Manager across all of Hyperion's equity strategies. He is also the Chair of Hyperion's Investment Committee.

Mark has been professionally analysing listed companies since 1991. He originally worked as a research analyst at Stockbroker Lance Jones Limited and then at Wilsons. Wilsons helped facilitate the establishment of Hyperion.

Mark is a qualified chartered accountant. Prior to establishing himself in the investment industry, Mark worked for KPMG. He holds undergraduate qualifications in Commerce and Law. Mark is a CFA Charterholder and is the largest executive shareholder in Hyperion.

Jason Orthman
Lead Portfolio Manager, Deputy CIO & Executive Director
CFA, B.Eng (Chemical), B.Bus

Jason was promoted to Deputy Chief Officer in 2017 in recognition of his contribution to Hyperion's alpha and strong communication skills within the broader team. Jason is also an Executive Board member of Hyperion Asset Management and serves as Deputy Chair of the Hyperion Investment and Executive Committees. Jason is responsible for setting and improving the investment framework and process with the CIO.

He continues to serve as Lead Portfolio Manager across all of its three equity strategies (Australian Equities, Small Cap and Global Equities). The two Lead Portfolio Managers have the vast majority of the influence in setting stock weights and are responsible for what stocks enter and exit the portfolios.

Jason joined Hyperion in 2008 as an Investment Analyst and was promoted to Portfolio Manager in 2009. Jason continues to be responsible for the research of equities in support of the team's investment decisions across Hyperion's product range. Jason gained 6 years industry experience as a Senior Research Analyst with a stockbroker, Wilsons, prior to joining Hyperion. Wilsons helped facilitate the establishment of Hyperion. He joined Wilsons in 2002 and spent most of his time at the firm in Research as a small to mid-cap Equity Analyst. He has covered a wide range of sectors including mining services, retail, manufacturing and waste.

Jason has a Bachelor of Chemical Engineering (1st Class Honours) and a Bachelor of Business Management from the University of Queensland. He also completed a Graduate Diploma of Applied Finance and Investment from the Australian professional body (now called FINSIA). Jason is a CFA Charterholder and significant shareholder of Hyperion.

"Investing is an intellectual challenge that includes unpacking different companies, business models and trends. It's a thrill to find new opportunities that create value over time."

William Hartnell
PM / Analyst
CFA, B.Com (Hons), B.BusMan

Will focuses on bringing fresh ideas to the investment team backed by rigorous analysis of companies' financial health and corporate strategy.

Prior to joining Hyperion in 2012, Will worked at PwC in Sydney and Brisbane in various roles including Mergers and Acquisitions, and Corporate Value Advisory. He has a passion for financial markets and enjoys using his corporate finance expertise to add value to portfolio management.

Will has undergraduate qualifications in Commerce (Honours) and Business Management, and is a CFA charterholder.

Liam Polkinghorne
PM / Analyst
CFA, LLB B.Com

Liam's role involves analysing the businesses in the Hyperion portfolios and researching new ideas that meet our rigorous investment criteria.

Prior to joining Hyperion in 2014, Liam worked for several years as a tax-structuring lawyer.

Like the rest of the investment team, Liam has conviction in Hyperion's quality-based, long-term investment process and is dedicated to executing that process in a disciplined and consistent way.

Liam has qualifications in Law and Commerce (majoring in Finance) and is a CFA charterholder.

Michael Mewburn
PM / Analyst
CFA, B.Fin`

Michael joined Hyperion in 2015 and is responsible for research and analysis on companies held within the Hyperion portfolios.

Prior to joining Hyperion, Michael gained over four years' experience as an analyst within the funds management industry.

Michael's experience in the industry makes him well placed to identify high quality opportunities that will help investors realise greater potential in the future.

Michael is a CFA charterholder and has completed a Bachelor of Finance and a Diploma of Financial Services.

Joel Gray
Analyst
CFA, B.Ec, F Fin

Joel is responsible for researching companies across the range of Hyperion's product range. He has been a part of the Hyperion team since January 2001, and has contributed to a very successful decade for our funds and our clients, during which we have proven how buying high quality companies at a reasonable price can create long-term wealth for our clients.

Joel is also involved in a range of charity work, including being on the advisory committee for the Animal Welfare Foundation of Australia.

Kelly Glover
Analyst
M.Fin

Kelly joined Hyperion in 2019 and is responsible for researching and analysing companies within Hyperion's global and domestic portfolios, in addition to researching new opportunities.

Kelly has over seven years' experience in the Finance industry including roles within equity research and corporate advisory.

Kelly has completed a Graduate Diploma of Applied Finance from the Queensland University of Technology and a Master of Finance from Bond University.

Tyson Arndt
Analyst
CFA, B.Com (Hons), B.Econ

Tyson joined Hyperion in 2019 as an Investment Analyst. He is responsible for research and analysis on companies held within the Hyperion portfolios, in addition to researching new ideas that meet the firm's rigorous investment criteria.

Prior to joining Hyperion, Tyson gained over four years' experience as an analyst and associate portfolio manager within the funds management industry.

Tyson is a CFA charterholder and has completed a Bachelor of Commerce (Honours) and a Bachelor of Economics from the University of Queensland.

Mike Hall
Analyst
B.Com (Finance)

Mike joined Hyperion in 2020 as an Investment Analyst. He is responsible for researching and analysing companies held within the Hyperion portfolios, in addition to researching new ideas that meet the firm's rigorous investment criteria.

Prior to joining Hyperion, Mike gained four years' experience as an investment analyst within the funds management industry.

Mike is a CFA Charterholder and has completed a Bachelor of Finance (Commerce).

Gonzalo Hernandez
Dealer
B.Bus

Gonzalo joined Hyperion in 2018 as a Dealer. He is responsible for the execution of domestic and international trades for the Hyperion portfolios.

Gonzalo has 3 years of experience in the funds management industry and prior to joining Hyperion he was a middle office analyst at Pinnacle Investment Management Group.

Gonzalo holds a Bachelor of Business (majoring in Finance and Economics) from the Queensland University of Technology and is currently working towards achieving the CFA designation having recently passed the Level 1 exam.

Patrick Egstorf
Dealer
B.Com (Finance), B.Eng (Civil)

Patrick joined Hyperion in 2019 as a Dealer. Alongside Gonzalo, Patrick is responsible for the execution of domestic and international trades for the Hyperion portfolios. Prior to joining Hyperion, Patrick worked as an analyst within Corporate and Institutional Banking.

Patrick holds a Bachelor in Engineering (Civil) and Commerce (majoring in Finance) from the University of Queensland. Patrick was recognised on the Dean's Honour Roll for graduating in the top 10 per cent of business, economics and law undergraduate programs. Patrick is currently working towards achieving the CFA designation having recently passed the Level 2 exam.

Timothy Samway
Chair

Having previously worked at the front line of Hyperion in client service and business development, Tim believes that hard work together with honest and transparent relationships are the foundations for creating a sustainable business that can deliver value to our clients.

Tim is excited by the Hyperion team's dedication to the delivery of a first-class service to our clients with a long-term view firmly in mind. After what's been a challenging time for fund managers, Tim is looking forward to the next 10 years as a time when Hyperion can consolidate its position as a sustainable producer of superior investment returns for our clients.

Tim also believes in contributing to the community through both thought leadership and involvement in charitable causes.

Ian Macoun
Director

During Ian's time on the Hyperion board, it has grown into a highly successful business, with the strongest performance track record of any boutique Australian fund manager.

Ian is committed to preserving the independence, accountability and focus of investment managers to help them deliver sustained outperformance by providing them with the Pinnacle model of supported independence.

Ian has played a significant role in transforming the industry from one which was totally dominated by institutional investment managers to one in which specialist firms like Hyperion play a major role – something that has vastly improved the quality of investment options for clients.

Ian has always made it a priority to contribute to the causes he is passionate about – education, health research, financial security for people in retirement, and integrity in our financial and capital market systems.