

## Finserve Global Security Fund Boosts Quant Edge with Martin Redgård

Under lead portfolio manager Joakim Agerback, the Finserve Global Security Fund has successfully capitalized on the global surge in defense, cybersecurity, and space investments through a top-down, fundamentally grounded and quantitatively enhanced investment process. To further strengthen the fund's systematic capabilities and support rapid growth in assets under management, the portfolio management team was recently reinforced with the addition of Martin Redgård.

Redgård brings deep expertise in systematic and macro strategies, execution, and risk management. His mandate includes expanding the fund's quantitative framework, broadening its regional exposure, and enhancing process efficiency – particularly in emerging defense and security sectors. He joins a team consisting of lead portfolio manager Agerback and portfolio manager Shayan Heidari.

The fund's investment approach begins with a thematic, top-down assessment to identify regions and sectors with long-term potential. This is followed by a quantitative screening to narrow down candidates, and finally, a fundamental deep-dive to select individual stocks. Since joining, Redgård has played a key role in strengthening this pipeline, identifying opportunities to streamline decision-making and integrate a more robust systematic layer.

"The team already had a highly effective process," says Redgård. "We saw that by further structuring the quant side, we could enhance both efficiency and breadth. Our goal was to build a system that continuously evaluates our universe, captures sector-based momentum, and improves portfolio monitoring and risk control."

The fund has continuously evolved from inception, with initially a purely fundamental strategy into a more systematic model, while still maintaining a strong qualitative foundation. Its models for identifying secular growth themes at the regional, sector, and company levels have been significantly refined since Redgård's arrival. "Adding Martin to the team has strengthened our ability to capture structural trends across a broader investment landscape," says Agerback. "Our recent expansion into the Indo-Pacific region was a major team effort, and Martin was central to making that a success."

One of the key enhancements Redgård introduced was a refined fundamentals-based screening process that more effectively identifies high-potential candidates for in-depth research. The team also implemented structured trade workflows — from initiation and monitoring to exit — including a five-point entry/exit model that supports increased trading volumes, particularly in small-cap names.

Prior to joining Finserve, Redgård managed his own short-term trend-following fund, Epoque, and previously served as CIO of U.S.-based CTA manager Taaffeite Capital Management. "When I saw what Joakim and the team were doing, I knew I wanted to be part of it. It's a winning concept, and I felt I could contribute meaningfully," Redgård reflects on his decision to join the Finserve Global Security Fund.

Since Agerback assumed leadership in May 2022, the Finserve Global Security Fund has captured the momentum behind the global "defense investing" megatrend. The fund returned 30 percent in 2024 and an impressive 45 percent in the first half of 2025. According to the team, Redgård has been instrumental in supporting this strong performance. Driven by results and rising institutional interest, the fund's assets under management have grown from SEK 1.3 billion just four months ago to over SEK 5.3 billion today.