

bohillpartners

BOOK CLUB

NEWSLETTER

Issue No. 14 | JUL 2024



Your ultimate summer guide

Our annual Bohill Partners book club is a round up of books, podcasts, movies and series, recommended to us by the leaders of the Real Assets industry.

We have also included some out of the box ideas, including exhibitions, podcasts, and even an App, to meet all preferences. There's something for everyone here and we hope you come away inspired, entertained and raring to go.

Books

From groundbreaking innovations and market wizards to historical sagas and personal growth, our curated list of books promises something for everyone.

Films/Series

Immerse yourself in our top film picks and thought-provoking documentaries to enrich your summer entertainment.

Podcasts

Tune into a lineup of podcasts that will keep you engaged and informed: insights from leading personalities and stories of success and dramatic screw-ups.

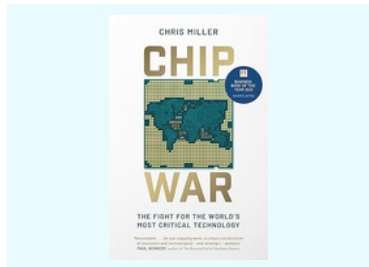
Exhibitions

A round-up of some not-be-missed exhibitions if you happen to be in London, Paris, Berlin or Dresden this summer.

BOOKS

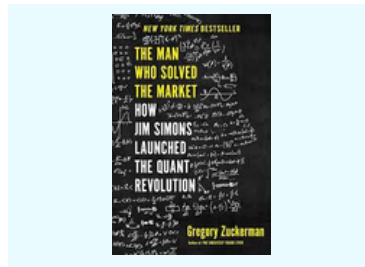
Dive in an eclectic mix of insightful reads

Non-fiction



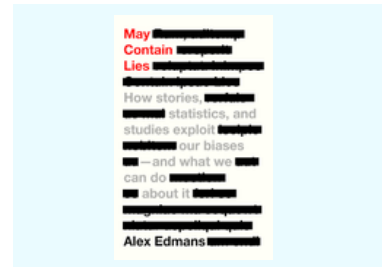
Chip War
by *Chris Miller*

This book explores the geopolitical and economic implications of the semiconductor industry, detailing competition and conflict surrounding this crucial technology. It reveals how control over microchip production has become a key factor in national security and economic power.



The Man who Solved the Market
by *Gregory Zuckerman*

This book chronicles the life and career of Jim Simons, the greatest money maker in modern financial history and founder of one of the most successful hedge funds. Through detailed storytelling, Zuckerman shows how Simons and his team revolutionised the financial industry.



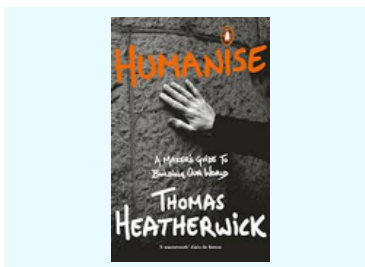
May Contain Lies
by *Alex Edmans*

Set against a backdrop of intrigue and personal turmoil, this novel explores how misinformation in our modern world is a minefield we all need to navigate. From social media to news headlines, misinformation is everywhere. Whether in business, finance, politics or the media, be aware of the health warning “may contain lies”.



Taking on the World
by *Ellen MacArthur*

An inspiring and gripping account of Ellen MacArthur's journey from determined young sailor to world-renowned solo circumnavigator. Ellen's story is of passion, perseverance, and triumph against the odds, offering readers a fascinating insight into the demanding world of solo sailing and the remarkable spirit required to excel in it.



Humanise
by *Thomas Heatherwick*

A visual feast and thought-provoking examination of design's potential to shape a more humane and sustainable future, this book explores Heatherwick's philosophy and approach to creating human-centered design in urban environments. It stresses the importance of considering human experiences and emotions in architectural and design practices.



Saving the Sun
by *Gillian Tett*

Recounting the story of the most lucrative buyout in history after the collapse of the Long Term Credit Bank of Japan in 2000, this book examines the dramatic transformation of Japan's financial sector in the late 1990s and early 2000s. It recounts the cultural and economic challenges faced by the foreign investors as they seek to reform and revive the Japanese bank.

BOOKS

Non-fiction



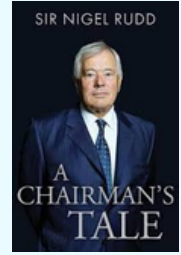
The Splendid and the Vile *by Erik Larson*

This gripping and intimate portrait of Winston Churchill and his inner circle during the Blitz, meticulously details the year from May 1940 to May 1941, when Britain stood alone against Nazi Germany's relentless bombing campaign. The book offers a compelling blend of history, biography, and drama, shedding light on a pivotal chapter in World War II.



Younger Next Year *by C Cowley and H Lodge*

This health and fitness book presents a compelling argument that ageing does not have to mean decline, and that with the right lifestyle choices, individuals can maintain vitality and physical fitness well into their later years. It provides credible scientific research and expert advice on how to improve our physical and mental health.



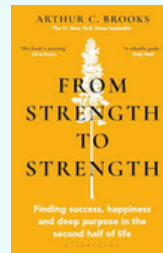
A Chairman's Tale *by Sir Nigel Rudd*

Sir Nigel Rudd provides a detailed account of his illustrious career as a prominent business leader and chairman of several major companies including Barclays and Boots. The book is a blend of memoir and business guide, offering insights into the challenges and triumphs of corporate leadership through the lens of Rudd's extensive experience.



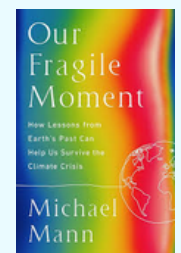
The Fearless Organization *by Amy Edmondson*

This book explores the concept of psychological safety and its crucial role in fostering a productive and innovative workplace environment. Throughout the book, Edmondson addresses how leaders can assess and measure psychological safety within their teams and organisations, and provides practical strategies and tools that leaders can use to promote this further.



From Strength to Strength *by Arthur Brooks*

From Strength to Strength explores how to achieve a fulfilling and meaningful life during the transition from the first to the second half of life. Drawing from a rich blend of psychological research, philosophy, and personal anecdotes, Brooks provides a roadmap for turning the challenges of ageing into opportunities for growth and deeper happiness.



Our Fragile Moment *by Michael Mann*

Mann, a renowned climate scientist, emphasises the fragility of the Earth's climate system and the urgent need for action to prevent catastrophic consequences. *Our Fragile Moment* draws lessons that are crucial for the survival of mankind.

Non-fiction



Exponential Organizations *by Salim Ismail*

This book explores a new breed of business entities that leverage technology to achieve rapid growth and significant impact. A great read for business leaders aiming to thrive in the digital age, challenging conventional business paradigms and providing practical strategies for transforming organisations to meet the demands of the future.

Fiction



The Ministry of Time *by Kaliane Bradley*

Blending elements of historical fiction, fantasy and adventure, this book revolves around a secretive government agency dedicated to protecting historical events from being altered by time travellers. The story follows the agents of the Ministry as they embark on missions across different eras to safeguard the timeline, encountering historical figures and events along the way. A clever, witty, funny and thought-provoking read.

News App

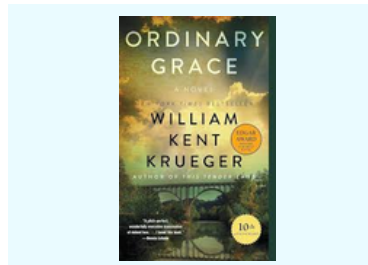
The Antidote to Negativity in the Mainstream media.

The Good News App is a digital platform designed to highlight and share positive and uplifting stories from around the world.

Unlike traditional news sources that often focus on sensational headlines, this app curates content that aims to inspire, motivate, and bring joy to its users. It features a wide range of topics, including heart-warming human interest stories, scientific breakthroughs, acts of kindness, and environmental successes.

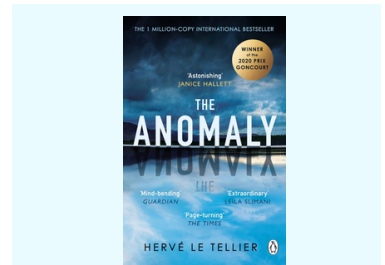
Available on the Apple Store and Android in English and German.

GOOD
news



Ordinary Grace *by William Kent Krueger*

A poignant coming-of-age novel set in a small Minnesota town during the summer of 1961. A thirteen-year-old boy, reflects on the events that profoundly shaped his understanding of life, death and faith. The story is a heartfelt exploration of how ordinary people find grace and resilience in the face of extraordinary challenges.



The Anomaly *by Herve Le Tellier*

After experiencing severe turbulence, a commercial flight lands twice - three months apart - with identical passengers on board. The story deals with the implications of this anomaly on the passengers' existence, reality, and identity blending elements of thriller and philosophical inquiry. A beautiful story about generosity towards others and also to ourselves.

Films

FILMS/SERIES



BOB MARLEY: ONE LOVE

This biographical drama explores the life and legacy of the legendary reggae musician, played by Kingsley Ben-Adir. Set during the peak of his career in the mid-1970s, the film highlights pivotal moments, including his struggles with political violence in Jamaica, his ground-breaking music career with The Wailers, and his personal challenges, including his battle with cancer. The film aims to celebrate Marley's timeless messages of love, peace, and unity.

Where to watch: *Odeon, Prime Video and Apple TV.*



POOR THINGS

A surreal and darkly comedic film starring Emma Stone as Bella Baxter, a young woman brought back to life by an eccentric scientist, Dr. Godwin Baxter, played by Willem Dafoe. The story follows Bella's journey of self-discovery and liberation as she navigates a bizarre and fantastical world, challenging societal norms and expectations. The film explores themes of identity, autonomy, and the nature of humanity, all delivered with director Yorgos Lanthimos' signature blend of absurdity and sharp social commentary.

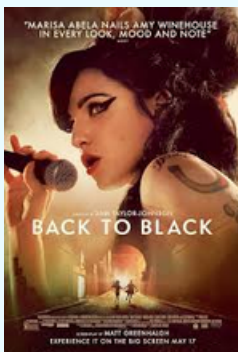
Where to watch: *Prime Video and Apple TV.*



RRR - RISE ROAR REVOLT

An Indian Telugu-language epic action drama, set in the 1920s, inspired by the lives of two real-life Indian revolutionaries. The film imagines a pre-independence India where the two heroes meet and form an unbreakable bond while fighting against the oppressive British colonial rule. RRR is known for its grandiose action sequences, powerful performances, and impressive visual effects. It combines elements of history, mythology, and nationalism, to celebrate heroism, friendship, and the struggle for freedom.

Where to watch: *Netflix.*



BACK TO BLACK

Detailing the life and career of the iconic British singer-songwriter Amy Winehouse, the film focuses on Winehouse's meteoric rise to fame, her struggles with addiction, and the impact of her tumultuous personal life on her music. Known for her deep, expressive voice and eclectic musical style, Winehouse's story is portrayed with sensitivity, highlighting both her incredible talent and the challenges she faced. The film is an intimate look at the woman behind the music, capturing her spirit, resilience, and the legacy she left behind.

Where to watch: *Prime Video.*

Series

CLARKSON'S FARM - SEASON 3

Jeremy Clarkson continues his journey in agriculture at Diddly Squat Farm, facing new and challenging obstacles.

This season focuses on turning unfarmed land, including woodland and hedgerows, into profitable ventures. Despite severe weather, high inflation, and bureaucratic hurdles, Clarkson's ingenuity leads to creative farming solutions involving pigs, goats, and other innovative uses of the land. Kaleb Cooper takes on a larger role as farm manager, adding both comedy and expertise.

Where to watch: *Prime Video.*



TRUE DETECTIVE: NIGHT COUNTRY - SEASON 4

Set in Alaska's remote and eerie landscape, this season follows detectives Liz Danvers (Jodie Foster) and Evangeline Navarro (Kali Reis) as they investigate the mysterious disappearance of six men from the Tsalal Arctic Research Station. As the investigation unfolds, they uncover chilling secrets and face their own dark pasts, all while contending with the harsh and isolating environment of the Arctic winter. The season continues the show's tradition of exploring complex characters and intricate, atmospheric storytelling.

Where to watch: *Sky Atlantic.*



SUPACELL

A British sci-fi series set against the vibrant backdrop of South London, in which ordinary people suddenly find themselves endowed with extraordinary powers. The series follows the characters as they discover how their newfound abilities affect their relationships, sense of identity, and place within the community. Unlike typical superhero stories, the series tackles real-life issues of youth gangs, knife crime, sickle cell and organised-crime syndicates. It's like 'Top Boy' meets the 'Avengers'. A fresh take on the superhero genre.

Where to watch: *Netflix*



THEATRICAL EXPERIENCE FOR THE BIG SCREEN

PRIMA FACIE

A one-woman play starring Jodie Comer which has been adapted for cinema audiences to offer a powerful and intimate theatrical experience on the big screen. Comer plays Tessa Ensler, a brilliant and ambitious young barrister who excels in the high-stakes world of criminal law. The story takes a dramatic turn when Tessa becomes a victim of sexual assault, forcing her to confront the very legal system she once so fervently championed. Comer's performance has been widely praised for its intensity and nuance, capturing the complexities of a character caught between her professional identity and personal ordeal.

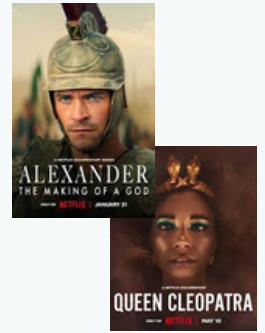
Where to watch: *Cinemas globally.*



DOCUMENTARIES

**ALEXANDER: THE MAKING OF A GOD
QUEEN CLEOPATRA**

The first is a six-part docuseries on the life of Alexander the Great, tracing his journey from a young prince to one of history's greatest conquerors. Paired with *Queen Cleopatra*, a docudrama exploring her rise to power, strategic alliances, and tumultuous relationships, both series combine expert interviews with dramatic re-enactments to detail the key events and personal relationships that shaped the lives of these great leaders. **Where to watch: Netflix.**

**PEPSI, WHERE'S MY JET?**

This documentary features the infamous 1995 legal battle between PepsiCo and John Leonard, a 20-year-old student who took Pepsi's promotional campaign at face value. The promotion humorously advertised that 7 million Pepsi Points could be exchanged for a military-grade Harrier jet, without any disclaimers indicating it was a joke. **Where to watch: Netflix.**

**FRIDA**

Frida is an intimate and vivid portrayal of the iconic Mexican artist. The film presents Kahlo's life through her own words, using material from her diaries, letters, essays, and print interviews, enriched by lyrical animations inspired by Kahlo's artwork, bringing her story and perspectives to life. Premiering at the 2024 Sundance Film Festival, where it won the Jonathan Oppenheim Editing Award, "Frida" has been praised for its creative storytelling and visual style, making it a must-watch. **Where to watch: Prime Video.**

**DRIVE TO SURVIVE**

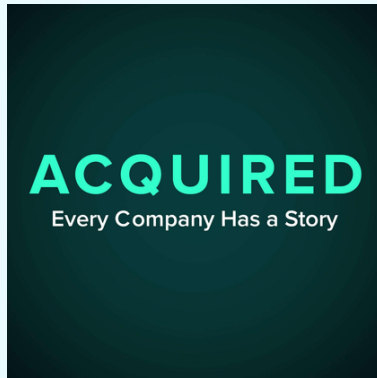
This six-season docuseries takes an in-depth look into the world of Formula 1 racing, offering viewers unprecedented behind-the-scenes access to teams and drivers. The series covers the dramatic events of each racing season, focusing on the intense rivalries, the strategic complexities, and the personal stories of the racers and team members. A compelling watch for anyone interested in stories of ambition, conflict, and resilience. **Where to watch: Netflix.**

**LIFE ON OUR PLANET**

Narrated by the legendary Morgan Freeman, this series explores the history of life on Earth, detailing the rise and fall of various species over billions of years. Combining stunning visuals and cutting-edge CGI, it brings to life the stories of prehistoric creatures and ancient ecosystems, highlighting the incredible resilience and adaptability of life, emphasizing the interconnectedness of all living things and the ongoing impact of environmental changes. Great watch for the whole family. **Where to watch: Netflix.**



PODCASTS



ACQUIRED

The 'Acquired' podcast, hosted by Ben Gilbert and David Rosenthal, dives deep into the stories and strategies behind some of the world's most successful companies. The podcast aims to uncover the playbooks that built these businesses, providing listeners with insights they can apply to their own careers as founders, operators, or investors.



LEADING

Rory Stewart and Alastair Campbell have joined forces once again for their new interview podcast, 'Leading'. Every Monday, they interrogate, converse with, and interview some of the world's biggest names - from both inside and outside of politics - about life, leadership, or leading the way in their chosen field. Whether they're sports stars, thought-leaders, presidents or internationally-recognised religious figures, Alastair and Rory lift the lid on the motivation, philosophy and secrets behind their career.



WE CRASHED

Now the inspiration for a new AppleTV+ series starring Jared Leto and Anne Hathaway, WeCrashed: The Director's Cut is a complete refresh of the original six-part series. Hosted by David Brown of the hit podcast Business Wars, this six-part series includes new interviews and new discoveries about the rise and fall of WeWork. It's a story of hope and hubris, big money and bigger screwups, and the lengths people will go to chase "unicorns". **Only available on Apple Podcasts.**

EXHIBITIONS



- **BERLIN & DRESDEN**

Celebrating **Caspar David Friedrich's** 250th birthday, three museums in Germany are staging a trio of exhibitions dedicated to one of the most important painter of German Romanticism.

Alte Nationalgalerie - Berlin
INFINITE LANDSCAPES

The exhibition highlights Friedrich's rediscovery in the 20th century, his pioneering role in modernism, iconic works like "Monk by the Sea" and "Abbey in the Oak Forest," and new research on his techniques underscoring his influence as a painter of light and atmosphere and a forerunner of modernism.

Running until: 4 August.

Albertinum &
Kupferstich-Kabinett - Dresden
WHERE IT ALL STARTED

Friedrich challenged academic tradition by seeking his own sources of inspiration, which he found in nature. Showcasing his nature-inspired works, the exhibition points out connections with places in the city and the region where the artist spent the longest and most productive period of his life.

Running from: 24 August - 5 January 2025.

- **PARIS**

Le Louvre

OLYMPISM - MODERN INVENTION, ANCIENT LEGACY

If you find yourself in Paris for the Olympic Games this summer, don't miss out on the *Olympism* exhibition at The Louvre. Through a blend of ancient artifacts, modern memorabilia, and thought-provoking displays, the exhibition not only honours Olympic history but also encourages visitors to appreciate the values and ideals that continue to drive this global phenomenon.

Running until 16 September 2024.



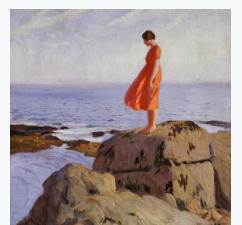
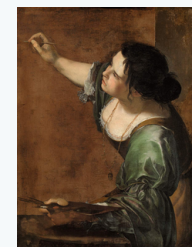
- **LONDON**

Tate Britain

NOW YOU SEE US - WOMEN ARTISTS IN BRITAIN 1520–1920

The *Now You See Us* exhibition at the Tate Britain follows the journeys of women to becoming professional artists between 1520 and 1920. Artists such as Mary Beale and Laura Knight paved a new artistic path for generations of women, challenging what it meant to be a working woman of the time by going against society's expectations.

Running until 13 October 2024.



A roundup of the latest market moves

New Ventures

Evonite

Former Patrizia trio, **Paul Hampton**, **Charles-Nicolas Tarrière** and **Kevin Muscat** have teamed up and founded Evonite, a new investment management business.

Greykite

Michael Abel, who was an Equity Partner at TPG Capital, and **Dan Valenzano**, who was Managing Director at Patrizia, have co-founded Greykite. They are joined by **Adam Regan** as General Counsel, previously Head of Real Estate at HWF Partners and **Mike Bradford** as CFO, previously with Goldman Sachs. Also joining from Goldman Sachs are **Shelby Weiss** as Principal, previously Executive Director, and **Nam Do** as Vice President

MC Property

Mark McLaughlin, who was a Managing Director at MM, **Rob Cotterell**, who was an Investment Director at Citivale Limited, **Wouter Zwetsloot**, who was a Managing Director at Cromwell, and **Martin Hanratty**, formerly a consultant at Noko Real Estate, have founded MC Property.

Arkus Real

Jeremy Bishop has started a new role as Founder and Chief Executive Officer of Arkus Real Estate, leaving Oxenwood Real Estate where he was Co-Founder and Investor.

Board Appointments

SGS Group has appointed **Peter Williams**, **Chris Harris** and **Jonathan Lurie** to the Board of the new venture, with **Jaap Tonckens** serving as Chairman.

Jens Ebert has been appointed as Management Board at Aam2core. He previously held the role of Managing Director, Alternative Investments at Patrizia.

C-Suite Appointments

SUSI Partners has hired **Sven Simonis** as part of their Member Leadership Team and Head of Client Solutions. His previous role was Head EMEA Institutional Distribution Asset Management at Credit Suisse.

Nido has recruited **Carlo Matta** as Chief Executive Officer. He joins from CA Ventures where he held the role of President, Head of Europe.

Fabian Hurzeler has been promoted to Chief Executive Officer, France at Swiss Life Asset Management. In his previous role, Fabian was Head of Real Estate Data and Digitalisation.

DLE Group AG has hired **Lars Meisinger** as their Chief Executive Officer. His previous role was Managing Director, Head of International Client Advisory at Aquila Capital.

Paddy Allen has been appointed as Chief Executive Officer at Kinetic Capital. He previously occupied the role of Head of Operational Capital Markets at Colliers.

Christian Daumann joins QSix as their Chief Executive Officer and leaves Ivanhoe Cambridge where he was Head of Investments, Germany.

C-Suite Appointments

Stefano Zucca Marmo has been appointed as Chief Operating Officer at Europa Capital where he was previously Head of Operations.

Scott Berry has become Chief Financial Officer at Apache Capital. He was previously Group Commercial Finance Director at Watkins Jones Group.

Benoît De La Boulaye has become Chief Investment Officer Europe at Edmond de Rothschild REIM. Until recently he was the Global Chief Investment Officer and Chief Executive Officer UK at BNP Paribas REIM.

Ulrich von Creyitz has been promoted to Chief Investment Officer, Real Estate, Europe at DWS Group. He was previously Managing Director, Head Real Estate Specialists.

STAM Europe has promoted **Samantha Roux** to Deputy Chief Executive Officer & Head of Investor Relations. She previously held the role of Director, Investor Relations.

Greg Minson has moved from Goldman Sachs where he was Global COO, MBD Real Estate to Intermediate Capital Group, where he now occupies the role of Global Head of Real Estate Asset Management.

Partners Group has recruited **Karim Habra** as Global Co-Head of Real Estate. In his previous role he was Head of Europe and Asia-Pacific at Ivanhoe Cambridge.

Ingo Heinen joins Schroders as their Global Head of Business Development and Product. He leaves Intermediate Capital Group where he was Managing Director.

Angus Dodd has become a Managing Partner at Wandle Real Estate Partners. He was previously Chief Executive Officer at Quintain Limited.

Senior Executive Appointments

Lapithus Management has recruited **Dirk Rueffel** as a Managing Director into their Frankfurt team. He joins from Cerberus European Servicing Advisors where he was a Managing Director responsible for a pan-European real estate portfolio.

Alessandro Marrese has been appointed as Managing Director at Stoneweg. He previously held the role of Director of Asset and Development Management at Prelios SGR.

Fabrice Lefevre Sory has become Managing Director, Real Assets for Edmond de Rothschild Asset Management in Paris, leaving Natixis Investment Managers where he was a Senior Vice President.

Matthew Filkin has become Managing Director, Fund and Asset Management at Birchwood Real Estate Capital. Previously, he founded Langley Real Estate.

Cain International have hired **Oliver Cummings** as a Managing Director and Head of PBSA. He joins from W.P. Carey, where he was formerly an Investment Officer and Head of European Student Housing Asset Management.

Catella has promoted **Petteri Kokko** from Head of Transactions to Managing Director.

Senior Executive Appointments

Fabio Longo has left Bain Capital where he was Head of Europe, Real Estate and Special Situations. He will be joining Mohari Hospitality. Ali Haroon has taken over his role at Bain Capital.

Antoine Le Treut has joined La Française Real Estate as their Deputy Managing Director. In his previous role, Antoine was an Asset Management Director at Gecina.

Steffen Meinshausen has been appointed Director, Head of Real Estate Germany at Tikehau Capital. He previously held the role of Director at Madison International Realty.

Richard James has been appointed Head of UK for Langham Hall. He leaves Savills Investment Management where he was Global Chief Financial Officer.

Schroders have hired **Allen Chiltan** as their Global Head of Real Estate Capital Formation. His Previous role was Head of Funds at Patrizia.

Mathieu Elshout has been appointed European Property Lead at Aware Super. He joins from Patrizia where he was Head of Sustainability and Impact Investing.

GID have hired **Eugenie Dadachpour** as Head of Europe. She joins from Pretium, where she was formerly Director for Business Development.

Justin Woolf has become Head of UK for DWI Group. In his most recent role, he was a Managing Director and Head of Acquisitions for the UK and Ireland at Tishman Speyer.

Nabil Aquedim has been appointed as Head of Real Estate and Asset-Backed Strategies at Arini. He previously held the role of Managing Director at Goldman Sachs.

Deva Capital Advisory have appointed **Catherine Hong** as their Head of Real Estate. She was previously with Morgan Stanley as a Managing Director in the Portfolio Solutions Group and most recently acted as a Senior Advisor to Sur Multi-Family Office.

Neil Meikle has joined Legal & General Investment Management as their Head of Real Estate Capital Raising. He most recently occupied the role of Global Head of Real Asset and Private Credit Investment Specialists at abrdn.

Monica Fan-Bradley has joined Ancala as their Head of Investor Relations. She leaves Aviva Investors, where she was Head of Institutional Sales and Consultant Relations.

Redevco has hired **Veronica Gallo-Alvarez** as their Head of Investment Management. She joins from abrdn where she was Head of Core Europe Funds.

Generali Real Estate has promoted **Stefano Lombardo** to be their Head of Debt Funds, previously occupying the role of Director.

NREP has promoted **Elisa Tuomi** from Head of Transactions, Finland to Head of Living.

Oxford Properties Group has hired **Valerie Bensiek** as their Head of Asset Management, Germany. She joins from Primonial Real Estate Investment Managers Germany where she was Director of Asset Management, Germany.

Rupert Gill has joined Barings as Head of Portfolio Management. He was previously with BlackRock as Head of European Real Estate Debt.

MARKET MOVES

Senior Executive Appointments

Sebastien Morizot has been promoted to Senior Director at EQT Exeter. Previously he held the role of Director.

Dave O'Brien has been appointed Investment and Development Director at EQT Exeter. He previously held the position of Head of Investments, Germany at Heimstaden.

Andrea Goss has been appointed as Director of Investor Relations at Orion Capital Managers. She was previously a Real Estate Investment Specialist at abrdn.

Anze Sagadin has become a Senior Portfolio Manager at Mirastar Real Estate Investment Management. Until recently she had been a Director in Portfolio Management and ESG at Tristan Capital Partners.

Rana Ghorayeb has been appointed as Executive Vice President at CDPQ. She previously held the role of President at Ortera Capital.

PIMCO has hired **Rachel Green** as Senior Vice President. Rachel previously worked for Nuveen as a Director in their Institutional Sales team.