



L1 Capital Long Short Portfolio Investor Webinar

June 2025



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Joint Managing Director
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A replay of the **June 2025 L1 Long Short Fund Limited Investor Webinar** can be accessed [here](#).

During today's update, Mark Landau (Joint Managing Director and Co-CIO) and Amar Naik (Head of Research) discussed:

- **Business update** (starts at 0.34)
- **Portfolio performance** (1.14)
- **Market observations** (2.19)
- **Portfolio positioning** (6.01)
- **Key portfolio themes** (8.55)

All resources referenced during the webinar can be found below.

[Watch | Webinar Replay](#)

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For more information, please do not hesitate to contact the L1 Capital Investor Services team at info@L1.com.au or [+61 3 9286 7000](tel:+61392867000).

Kind regards,
L1 Capital