



CFA Institute

63RD ANNUAL FINANCIAL ANALYSTS SEMINAR

Improving Investment Decisions

23–26 July 2018
University of Chicago Gleacher Center
Chicago, Illinois, USA

#ChicagoFAS

Hosted with CFA Society Chicago





OUTLOOK FOR EMERGING MARKETS

Arthur Budaghyan

Senior Vice President and Chief, Emerging Markets Strategist
BCA Research



IMPROVING THE INVESTMENT DECISION PROCESS: BEHAVIORAL ALPHA

Nili Gilbert, CFA

Cofounder and Portfolio Manager
Matarin Capital Management

THE FUTURE OF BLOCKCHAIN, AI, AND OTHER EMERGING TECHNOLOGIES: IMPACT ON INVESTMENT MANAGEMENT

Melanie Swan

Technology Theorist, Philosophy Department, Purdue University
Founder, Institute for Blockchain Studies

PERSPECTIVES FROM A QUANTITATIVE PORTFOLIO MANAGER: CAPTURING STYLE PREMIA IN GLOBAL MARKETS

Sarah Jiang

Researcher and Portfolio Manager, Global Alternative Premia Multi-Strategy Team
AQR

GLOBAL REAL ESTATE: MARKET VIEWS AND STRATEGIES

Sonny Kalsi

Founder and Partner
GreenOak Real Estate

MARKET NARRATIVES, LONG-TERM DISRUPTORS, AND DATA TRENDS INVESTORS SHOULD CONSIDER

Nicholas J. Colas

Cofounder
Datatrek Research

DRIVERS OF EQUITY VALUATION

Jim O'Shaughnessy

Chairman and Chief Investment Officer
O'Shaughnessy Asset Management

THE IMPORTANCE OF FIRM CULTURE TO INVESTMENT PERFORMANCE

James Ware, CFA

Founder
Focus Consulting Group

STRATEGIES IN FIXED INCOME

Anne B. Walsh, CFA

Chief Investment Officer, Fixed Income
Guggenheim Partners

THE NEW FRONTIER INVESTORS AND THE FUTURE OF INSTITUTIONAL INVESTMENT MANAGEMENT

Ashby Monk

Executive and Research Director, Stanford Global Projects Center
Stanford University

PREDICTING THE MARKETS

Ed Yardeni

Author, *Predicting the Markets: A Professional Autobiography*
President, Yardeni Research, Inc.

EXTREME RESPONSIBLE INVESTING: WHY WE WITHDREW FINANCE FROM SOUTH AFRICA'S STATE-OWNED ENTERPRISES... AND WHAT WE FOUND OUT AFTERWARD

Andrew C. Canter, CFA

Chief Investment Officer
Futuregrowth Asset Management

THE VALUE OF ACTIVE MANAGEMENT IN MULTI-ASSET CLASS PORTFOLIOS

Karen McQuiston, CFA

Managing Director and Head of Institutional Advisory and Solutions
PGIM



**INCORPORATING GEOPOLITICAL
RISKS IN INVESTMENT
DECISION MAKING**

Meredith Sumpter

Head, Research Strategy
and Operations
Eurasia Group



**WHAT'S WORKING IN CAPITALISM TODAY
AND MORE IMPORTANTLY, WHAT ISN'T**
Luigi Zingales

Robert C. McCormack Distinguished
Service Professor of
Entrepreneurship and Finance
University of Chicago Booth
School of Business

REGISTER ONLINE

To see the complete agenda and to register, please visit
www.cfainstitute.org/events

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CFA Institute Investment Foundations® Program Certificants/Candidates:	US\$2,995
Non-Member:	US\$3,495
Group:	US\$2,495 per delegate*

**three delegate minimum; additional discounts do not apply*

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CONTINUING EDUCATION

This conference qualifies for 28 CE credits, inclusive of 3 hours in the content areas of Standards, Ethics, and Regulations (SER) under the guidelines of the CFA Institute CE Program.

Please note: Information is accurate as of 20 March 2018.



CFA Institute

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