



Student Managed Investment Fund Consortium Conference

October 28-29, 2021

Embassy Suites Downtown



SCOTT COLLEGE OF BUSINESS
INDIANA STATE UNIVERSITY

SMIFC.org

Welcome

Welcome to the Student Managed Investment Fund Consortium (SMIFC) Conference! The SMIF Consortium had 18 member institutions when it was founded in 2013. We are excited to announce that the SMIFC currently has 112 members.

The purpose of this consortium is to enhance student learning and scholarship, record best practice in investment management among partners, provide a vehicle for student networking and exchange of ideas. The SMIFC builds a community of institutions with a shared vision for student success and leadership in investing. This common purpose provides for a broad network of support, problem solving, and friendship. The SMIFC also establishes relationships with industry partners who provide opportunities for student scholarships and internships.

This year, we are thrilled to add to the list of distinguished guest speakers, **Lindsey M. Piegza, Ph.D, Charles Bobrinsky and Matt Moran**. Charles Bobrinsky is the Vice Chairman for Ariel Investments. Bobrinsky also served as a managing Director and Head of North American Investment Banking Branch offices. He is also a frequent guest at CNBC and other TV stations. Dr. Piegza is Senior Economist for Stifel specializing in research and analysis of economic trends and activity, world economies financial markets and monetary and fiscal policies. She is a regular guest on CNN, Bloomberg, CNBC and FOX Business Matt Moran is head of Index Insights, CBOE Options Institute. Prior to joining CBOE, Matt served as Trust Counsel at Harris Bank and Vice President at the Chicago Mercantile Exchange.

We are pleased to welcome to the SMIFC Conference **Buff Dormeier** and **Christopher Vincent**. **Buff Dormeier** is Partner and Chief Technical Analyst, Kingsview Partners Society Chicago. He has received several honors including Best in State Wealth Advisor by Forbes and the Charles H. Dow Award for for his work in technical analysis. **Christopher Vincent** is President and Chief Executive Officer of CFA Chicago and has spent the majority of his career as a fixed income portfolio manager in Chicago with William Blair and Zurich Scudder.

Also presenting through the panel discussion session: **Tom Digenan**, is the Lead Investment Specialist for Equities in WMA. In his role, he is responsible for driving equity strategy in the channel and supporting Client Advisors for Active equity products. **Jeff Kernagis**, Senior Vice President, Northern Trust Asset Management, **David Hemming**, Head of Alternative ETF Portfolio Management at Invesco and **Jeffrey Feldman**, head trader for the Liquidity Group at Wolverine Trading.

We look forward to your active participation in the program and hope that you enjoy the conference.



Terry Daugherty, Ph.D.
Dean



Tarek S. Zaher, Ph.D.
Professor of Finance



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Who We Are

Student Managed Investment Fund Consortium

The Student Managed Investment Fund Consortium (SMIFC) provides a forum among member institutions to share student managed investment fund best practices in investment management and organization administration. Activities of the consortium emphasize graduate and undergraduate student education, research, and leadership.

Follow us at: SMIFC2021.org or #SMIFC2021

About Indiana State University

Indiana State University, established in 1865, is a public university that embraces its mission to educate the leaders of tomorrow with focus on research, experiential learning, and civic engagement. Its five colleges offer courses leading to undergraduate and graduate degrees and certificates in arts and sciences; business; education; health and human services; and technology.

Scott College of Business



The Scott College of Business is dedicated to providing an internationally-accredited professional education to qualified students at both the undergraduate and master's levels. Our primary focus is to prepare students to take leadership roles in both public and private organizations. The College supports, encourages, and produces applied and educational research, development of relationships with the business community, and service to the region and the professions. In 1980, Indiana State University's business programs first earned accreditation through the Association to

Advance Collegiate Schools of Business (AACSB) and has continued to maintain accreditation for more than 30 years. AACSB International (The Association to Advance Collegiate Schools of Business) accreditation represents the highest standard of achievement for business schools, worldwide. Institutions that earn accreditation confirm their commitment to quality and continuous improvement through a rigorous and comprehensive peer review.

AACSB International accreditation is the hallmark of excellence in management education. Fewer than 25 percent of business schools earn this distinction.



Dr. Tarek Zaher

SMIFC Conference Chair, Professor of Finance, Scott College of Business, Indiana State University



Tarek Zaher has held a number of professional positions with the industry and provided consulting services to a number of international institutions including the World Bank, the William Davidson Institute at the University of Michigan, and the Academy for Educational Development in the United States and the Ministry of Work in Dubai. He has also offered a number of seminars in investment and international financial management at a number of institutions around the world.

Dr. Zaher is the supervisor of the investment club at Indiana State University. He also manages and supervises other international portfolios for individuals and institutions. Dr. Zaher's research has been published in numerous prestigious professional and scholarly journals, including the Journal of Financial Research and Journal of Banking and Finance. Dr. Zaher received three research awards from professional conferences and one research certificate of excellence. He was also recognized by the Scott College of Business as the winner of the faculty research award in 2002 and the winner of the exemplary service award in 2004.

Dr. Terry Daugherty

Dean, Scott College of Business, Indiana State University



Dr. Terry Daugherty is the Dean of the Scott College of Business at Indiana State University (ISU) and an expert in digital marketing, consumer psychology, and behavioral research. Having served on the faculty at Vanderbilt University, University of Texas at Austin, and the University of Akron, Terry has authored over 70 intellectual contributions while presenting his work at leading academic conferences worldwide. He is the past Editor-in-Chief of the Journal of Interactive Advertising for the

American Academy of Advertising and Co-Editor of a Special Issue on Neuromarketing for the European Journal of Marketing. Terry completed his undergraduate degree from Western Kentucky University, master's at the University of Alabama, and Ph.D. from Michigan State University.

Dr. Jin Park

Chair, Accounting, Finance, Insurance and Risk Management, Associate Professor of Risk Management and Insurance, Scott College of Business, Indiana State University



Dr. Jin Park joined the Scott College of Business in fall 2009 and has been the chair of Accounting, Finance, Insurance and Risk Management Department since March 2019. He teaches classes relating to risk management, property and liability insurance, and employee benefits. His research areas of interest include asset-liability management, performance, and organizational efficiency. He has awarded Best in Track Award three years in a row (2007 – 2009) at Academy of Finance.

He earned his Ph.D. from Temple University, Philadelphia, PA in 2003, and was an assistant professor (2003-2009) at Illinois Wesleyan University, Bloomington, IL.

Agenda

Thursday, October 28, 2021

- 11:45 A.M. - 12:45 P.M. CHECK IN & LUNCH**
Embassy Suites, River North Ballroom
- 12:45 - 1:00 P.M. OPENING REMARKS**
Embassy Suites, River North Ballroom
Dr. Tarek Zaher, *Professor of Finance/Co-Founder and Managing Director of SMIFC, Scott College of Business, Indiana State University*
Dr. Terry Daugherty, *Dean, Scott College of Business, Indiana State University*
- 1:00 - 2:00 P.M. ECONOMIC OUTLOOK**
Embassy Suites, River North Ballroom
Lindsey M. Piegza, Ph.D. *Managing Director, Chief Economist, Stifel, Nicolaus & Company, Incorporated*
- 2:00 - 2:10 P.M. BREAK**
- 2:10 - 3:10 P.M. RECENT DEVELOPMENTS IN BEHAVIORAL FINANCE**
Embassy Suites, River North Ballroom
Charlie Bobrinskoy, *Vice Chairman, Ariel Investments*
- 3:10 - 3:20 P.M. BREAK**
- 3:20 - 4:20 P.M. PANEL DISCUSSION:
Portfolio Management And Trading - Practical Applications In The Workplace**
Embassy Suites, River North Ballroom
Jeff Kernagis, CFA - *Senior Vice President, Northern Trust Asset Management*
David Hemming, *Head of Alternative ETF Portfolio Management, Invesco.*
Jeffrey Feldman, *Head trader, Wolverine Trading*
Moderator: **Tom Digenan**, *Lead Investment Specialist for Equities in WMA*
- 4:20 - 5:30 P.M. SMIFC TEAMS POSTER SESSION**
Embassy Suites, Lakeview Room
Sponsored by **Chartered Market Technician Association**
- 5:30 - 6:30 P.M. MANAGER'S RECEPTION**
Embassy Suites, Lobby

- 6:30 - 8:00 P.M. DINNER, AWARDS DISTRIBUTION, AND WINNING TEAMS PRESENTATION**
Embassy Suites, River North Ballroom.
Poster Session Competition Awards
Sponsored by **CMT Association**
Student Competition Awards
Sponsored by **CMT Association**
Competition winners will be announced and awards distributed followed by a short presentation by winning teams

Friday, October 29, 2021

- 8:00 - 9:00 A.M. BREAKFAST**
Embassy Suites, River North Ballroom
- 9:00 - 9:50 A.M. INVESTMENT MANAGEMENT AND FINANCIAL ANALYSIS**
Christopher T. Vincent, CFA, *President & Chief Executive Officer CFA Chicago*
- 9:50 - 10:00 A.M. BREAK**
- 10:00 - 11:00 A.M. THE VOLUME FACTOR IN PORTFOLIO MANAGEMENT**
Embassy Suites, River North Ballroom
Buff Dormeier CMT, *Partner & Chief Technical Analyst, Kingsview Partners*
- 11:00 - 11:10 A.M. BREAK**
- 11:10 A.M. - 12:00 P.M. USE OF OPTIONS, FUTURES AND THE VIX® INDEX IN INVESTMENT FUND MANAGEMENT**
Embassy Suites, River North Ballroom
Matt Moran, *Head of Index Insights, Cboe Options Institute*
- 12:00 - 1:00 P.M. SMIFC PARTNERS MEETING**
Embassy Suites, Lincoln Park Room
Agenda
Advisory Board
Additional Sponsorships
SMIFC Journal
SMIFC Logo
Dates and venue for next year's conference
Recommendations for program changes
- 1:00 P.M. CLOSING REMARKS**
Jin Park, *Chair, Accounting, Finance, Insurance and Risk Management, Associate Professor of Risk Management and Insurance. Scott College of Business, Indiana State University*

Featured Speakers (Listed Alphabetically)

Charles K. Bobrinsky

Vice Chairman, Ariel Investments



Charlie manages Ariel's focused value strategy—an all-cap, concentrated portfolio of U.S. stocks. He also spearheads Ariel's thought leadership efforts and takes an active role in representing Ariel's investment strategies with prospective investors, clients and major media. Prior to joining Ariel in 2004, Charlie spent 21 years as an investment banker at Salomon Brothers and its successor company Citigroup, where he rose to managing director and head of North American investment banking branch offices. Charlie actively serves the Chicago community, sitting on the corporate boards of State Farm Mutual Automobile Insurance Company and ACI Worldwide as well as the boards of the Big Shoulders Fund, La Rabida Children's Hospital Foundation, the Abraham Lincoln Presidential Library Foundation and the Chicago Club. He also teaches monthly investing classes at two Chicago inner-city schools. Charlie graduated with an AB in economics from Duke University and earned an MBA from the University of Chicago.

Buff Dormeier, CMT

Partner and Chief Technical Analyst, Kingsview Partners



Partner and Chief Technical Analyst, Kingsview Partners Buff Dormeier, CMT® provides four important roles to our clientele that of a financial advisor, consultant, analyst, and a portfolio manager. Armed with proprietary indicators and investment programs, Buff dynamically advises affluent and institutional clientele on strategies to help meet their specific investment objectives in what are often uncertain investment climates. As an advisor, Buff has been named a "Best in State Wealth Advisor" by Forbes*. As an analyst in 2007, Buff's technical research was awarded the Charles H. Dow Award**, distinguishing him as the only financial advisor to thus far win the Award. The Charles H. Dow Award is considered one of the most important recognitions in the field of technical analysis.

An award-winning author (2012's Technical Analyst Book of the Year / Trader Planet's Top Book Resource 2011), Buff literally wrote the book on "Investing with Volume Analysis" partnering with the Financial Times Press, Pearson Publishing and the Wharton School. Buff's research has been further featured with press partners including Barron's, Stock's & Commodities, Futures and Active Trader magazines, The Financial Times, C-NBC, Market Watch as well as a variety of technical journals. Buff is featured in "Technical Analysis and Behavior Finance in Fund Management" – a European book comprised of interviews with 21 esteemed portfolio managers.

Tom Digenan



Tom Digenan is the Lead Investment Specialist for Equities in WMA. In his role, he is responsible for the company's equity strategy in the channel and supporting Client Advisors for Active equity products.

Prior to his current role, Tom worked in the Active equity team for over 20 years, latterly as head of the US Intrinsic Value Equity team. In this role, he was responsible for US equities portfolio construction and research. Tom is a member of the CFA Institute and the American

Institute of Certified Public Accountants. He is formerly a Board member of CFA Society Chicago. He is also currently on the Advisory Board for the Driehaus Center for Behavioral Finance at DePaul University. Tom has been a guest lecturer at Northwestern University, University of Notre Dame and Creighton University. He has also served as an adjunct professor at DePaul University since 2020.

Jeffrey Feldman

Head trader, Wolverine Trading



Jeffrey Feldman is the head trader for the Liquidity Group at Wolverine Trading. He is responsible for risk management and trading of ETFs. The liquidity desk acts as a principal market making desk for ETFs providing liquidity and transparency to the market place. Jeffrey focuses on trading equities, futures, and fixed income products.

David Hemming

Head of Alternative ETF Portfolio Management, Invesco

David Hemming is the Portfolio Manager for the Invesco Optimum Yield Diversified No K-1 ETF, plus an additional eight commodity ETF's, 10 currency ETFs and has oversight of the European Commodity ETF's. David started his career at State Street Global Advisors as an analyst for their European balanced funds. David was a Senior Portfolio Manager and Principal at Hermes Fund Managers, running their commodity capabilities. He started trading commodities in 2006 for the British Telecom Pension Scheme. David holds a joint honors MA in Economics and International Relations from the University of St. Andrew's. He also received an MSc in Portfolio Management from Cass Business School, City University London.

Jeff Kernagis, CFA

Senior Vice President, Northern Trust Asset Management



Jeff recently joined Northern Trust as a Senior Portfolio Manager. In this role he will oversee a number of funds and portfolio managers in addition to helping the firm expand its FlexShares bond ETF business globally. During his 13 year tenure at Invesco/PowerShares, he spearheaded a ETF portfolio management team which grew from 0 to \$40 billion in bond ETF assets globally. Jeff was also a PM at Claymore (Guggenheim) Securities where he managed both equity ETFs and bond Unit Investment Trusts. In addition, he was a senior bond trader at Mid-States (Alloya) Corporate Federal Credit Union. Prior to working in investment management, Jeff held institutional derivative sales positions at ABN Amro, Bear Stearns, and Prudential Securities.

Jeff earned a BBA degree from the University of Notre Dame and an MBA from DePaul University. He is a Chartered Financial Analyst® (CFA) charterholder and a former CFA Society Chicago Board member/officer

Matt Moran

Head of Index Insights, Cboe Options Institute

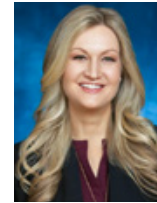


Matt is focused on the exchange's educational efforts for pension funds, Registered Investment Advisors (RIAs), mutual funds, and other institutional investors. He has traveled to more than 100 cities worldwide to educate investors and deliver financial presentations. Prior to joining Cboe, Matt served as Trust Counsel at Harris Bank and Vice President at the Chicago Mercantile Exchange. He is an associate editor of The Journal of Index Investing and has written articles for several financial publications, including The Journal of Trading and The Journal of

Alternative Investments. Matt holds MBA and JD degrees from the University of Illinois at Urbana-Champaign.

Dr. Lindsey M. Piegza

Managing Director, Chief Economist, Stifel, Nicolaus & Company, Incorporated



Dr. Lindsey Piegza is the Chief Economist for Stifel Financial. She specializes in the research and analysis of economic trends and activity, world economies, financial markets, and monetary and fiscal policies. Prior to her role with Stifel, she was the Senior Economist for an investment bank in New York City for eight years consulting clients in the U.S., Europe, Asia and the Middle East.

A highly sought-after speaker across national and international forums, Piegza is often quoted in the business press. She is a regular guest on CNBC, Bloomberg, CNN and Fox Business, as well as national radio and other business news outlets. Piegza is also a monthly op-ed contributor for The Hill.

In addition to her role with Stifel, Piegza is an instructor at the Pacific Coast Banking School, a member of the Chicago Federal Reserve Advisory Committee and a well-respected author. Piegza has published numerous academic papers in prestigious journals such as the Harvard Business Review and in textbooks from Northwestern University's Kellogg Graduate School of Management.

Piegza is a member of the National Association for Business Economics (NABE) and American Economic Association (AEA), and named a 2019 Women of Influence by the Chicago Business Journal. She holds two degrees from Northwestern University in political science and economics, and earned her Ph.D. in economics from the City University of New York. She is a native of Chicago and is based in Stifel's downtown Chicago office.

Christopher T. Vincent, CFA

President & Chief Executive Officer, CFA Chicago



Chris Vincent, CFA, joined CFA Society Chicago as chief executive officer in May of 2020. The majority of his investment career was spent as a fixed income portfolio manager in Chicago with two firms, William Blair and Zurich Scudder. He was head of fixed income and a partner at William Blair Investment Management (2002-2019) where he managed bond mutual funds and separate accounts. At Zurich Scudder (the successor firm to Kemper Financial), Vincent was a managing director and senior portfolio manager for institutional clients (1988-2002). His roots in the money management industry are as a corporate plan sponsor with Nestle Purina in St. Louis (1983-1988).

Vincent has been a volunteer for CFA Society Chicago and CFA Institute since 2006. He previously served as chair of the Board of Directors for CFA Society Chicago (2014-2015) and has also volunteered for various CFA Institute groups and committees, notably as a member of the Annual Conference Advisory Committee (2012-2018).

Vincent earned his CFA charter in 1990, received his undergraduate degree in finance from the University of Missouri and holds an M.B.A. from Saint Louis University.

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The logo for Edward Jones features the name "Edward Jones" in a bold, black, serif font, centered within a solid yellow rectangular background.

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Indiana State University

Indiana State University, established in 1865, is a public university that transforms the lives of students through a high-quality education infused with experiential learning, community engagement and career-readiness. Our students succeed within a culture of inclusion and support that provides the skills and knowledge to impact Indiana and beyond.



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Stifel

Stifel is a diversified global wealth management and investment banking company focused on building relationships that help individuals, families, and organizations pursue their financial goals. The iconic image of the bull and bear shows the dedication and spirit of each member of our firm. We are individually and collectively committed to using the forces of the market to benefit our clients.

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