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Dr. George Athanassakos, professor of finance, **Western University's Ivey Business School**

Dr. George Athanassakos is a professor of finance and the Ben Graham chair in value investing at Ivey Business School, which he joined in July 2004. He's also the founder and managing director of both the Ben Graham Centre for Value Investing and the Center for the Advancement of Value Investing Education, which he launched in 2006 and 2008, respectively. Prior to joining Ivey, Dr. Athanassakos spent several years at various research-related positions with banking and trust companies in Canada and Greece. He has also taught at York University as professor of finance and at Wilfrid Laurier University, where he was founder and director of Laurier's financial planning program. He has a bachelor's degree in economics and business administration from the School of Industrial Studies of Thessalonica, Greece, as well as a master's degree in economics, an MBA and a PhD in finance from York University. The Financial Planning Standards Council has bestowed Dr. Athanassakos with the FP Canada Fellow distinction for his outstanding contribution to furthering the council's mission and for advancing the financial planning profession. Dr. Athanassakos is also a fellow of the Quality Shareholder Initiative at the George Washington University Law School in Washington, D.C. and is the only Canadian to receive this distinction.

Dr. Athanassakos has been ranked among the top 10 researchers in Canada by research published in *Financial Management* and among the top 10 Canadian professors by the *Globe and Mail*. He has researched extensively the institutional attributes of the Canadian capital markets, the effect institutional trading and analysts' forecasts have on stock-market performance, stock- and bond-market anomalies and bond- and equity-valuation issues. He has prepared studies on the Canadian capital markets and industry analyses for Greece and Canada. His cases have been published in *Canadian Cases in Financial Accounting*, *Cases in Hospitality Management* and *Case Research Journal*.

Dr. Athanassakos has offered seminars on traditional valuation and/or value-investing valuation to Canadian and U.S. valuator societies and in Australia, Austria, Chile, Colombia, Cyprus, Denmark, Finland, France, Greece, Italy, Liechtenstein, South Africa, Spain and the U.K. He's the recipient of Ivey's teaching innovation award and Western University's USC teaching honor roll,

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as well as numerous research grants from university and government departments. Dr. Athanassakos is also the winner of numerous first-prize awards for best research papers and is a three-time winner — in 1991, 1994 and 2003 — of the Toronto Society of Financial Analysts' best research paper award competition. He has served as an editor-in-chief of the *Journal of Business and Financial Affairs* and is a member of the boards of directors of the Financial Planners Standards Council of Canada and the Canadian Institute of Financial Planners. He's also a member of the editorial board of the *Canadian Investment Review*, a member of the research advisory board of the Canadian Securities Institute and Clarica Financial Services Research Center and is vice-president membership and president of the Multinational Finance Society. He has also been in the program committees of the Eastern Finance Association, European Financial Management Association, Midwest Finance Association, Multinational Finance Association, Northern Finance Association and Southern Finance Association conferences, among others. He served as the chair and organizer of the 1999 Multinational Finance Conference in Toronto, as well as for the Ben Graham Center's symposiums on intelligent investing since 2007 in Toronto and London, Ontario and in Crete, Greece and since 2012, for the Ben Graham Centre's Value Investing Conferences in Toronto. He's currently an editor of the *Multinational Finance Journal*, a member of the editorial boards of the *International Journal of Economics and Business Administration* and the *European Research Studies Journal*, as well as a member of the academic advisory board of the Financial Planners Standards Council and a member of the board of trustees of the Multinational Finance Society.

Dr. Athanassakos has been published in numerous journals including *Advances in Futures and Options Research*, *Applied Financial Economics*, *Canadian Journal of Administrative Sciences*, *Financial Analysts' Journal*, *Journal of Banking and Finance*, *Journal of Business Finance and Accounting*, *Journal of Economics and Business*, *Journal of Financial Research*, *Multinational Finance Journal*, *Review of Financial Economics* and others. His books include *Derivatives Fundamentals*, *Equity Valuation: A Guide to Discounted Cash Flow and Relative Valuation Methods* and *Value Investing: From theory to practice – A guide to the value investing process*. Dr. Athanassakos has also written articles for the *Financial Post* and currently writes, as a guest columnist, about investments and economic and financial topics in *The Globe and Mail* and the *Canadian Investment Review*.

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Ram Thirukkonda, CFA, CAIA, senior vice-president, senior investment strategist, client advisory, **Acadian Asset Management LLC**

Ram joined Acadian in 2018 and is a senior investment strategist on the client advisory team, aligned closely with Acadian's global client group and investment teams. Prior to joining Acadian, Ram was a quantitative research analyst on the asset allocation team at GMO LLC, focused on portfolio construction, risk models and signals. Ram also previously worked as a quantitative analyst at Batterymarch Financial Management, where he conducted research on quantitative equity portfolios. Ram holds an M.S. in financial engineering from MIT, an M.S. in transportation engineering/operations research from MIT and a B.Tech. in civil engineering from Indian Institute of Technology, India. He is a CFA charter holder and a member of CFA Society Boston as well as a CAIA charter holder and a member of the CAIA Association.

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David Philpotts, head of strategy, QEP investment team, **Schroders**

David Philpotts is head of strategy for the QEP investment team based in London and has been part of the team for 19 years. He joined Schroders in 1996, initially as an economist and strategist before moving to the QEP Team in 1999. He was instrumental in developing the team's stock selection models and investment strategies. David was chief investment officer & head of research at quaestor investment management from 2001 to 2003, which involved the management of four market neutral global hedge funds. He then migrated to Australia where he rejoined the QEP Team in 2004 based in Sydney as head of QEP before relocating back to the UK in early 2019. Prior to joining Schroders, David worked at the Bank of England as an econometrician (1990-1993) and worked as a fixed income strategist for at Stone & McCarthy Research Associates from 1993 to 1996. David holds an MSc and a BSc in economics from the University of Warwick.

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Mihai Florian, senior portfolio manager, **BlueBay Asset Management**, **RBC Global Asset Management**

Mihai is a senior portfolio manager within the emerging markets team. He joined BlueBay in January 2020 and his primary portfolio management responsibilities include the illiquid strategy covering loans, illiquid instruments, special situations and distressed. Prior to joining BlueBay, Mihai was a founding partner for the credit strategies at Helios Investment Partners. Mihai has 20 years' experience including on the sell-side where his last role was heading the emerging markets structuring team at Bank of America Merrill Lynch across fixed income, currencies and commodities. Mihai holds a master's degree (MSc) in economics and finance from Warwick University.