

Press Release

London, Nice, Singapore, September 28, 2012

## **EDHEC-Risk Institute and CFA Institute to reinforce their executive education partnership**

EDHEC-Risk Institute and CFA Institute are pleased to announce the reinforcement of their executive education partnership (initiated in 2008 with the Advances in Asset Allocation Seminar) by offering the **Advances in Equity Portfolio Construction Seminar**. The course aims to provide investment practitioners with the tools to better understand the limits and benefits of different portfolio construction approaches, and to discuss alternative equity index strategies.

The two-day programme is intended for finance practitioners who contribute to the design and implementation of portfolio construction models and is also insightful for investment professionals who analyse or decide on the adoption of appropriate model portfolios or benchmarks for equity investments, or who are interested in customising their strategic equity benchmark.

The event will take place on 20-21 November, 2012 in Singapore and on 12-13 February, 2013 in London. The seminar will be conducted by EDHEC Business School Professor, Raman Uppal, and EDHEC-Risk Institute Head of Applied Research, Doctor Felix Goltz. Professor Uppal is a specialist in optimal portfolio selection and asset allocation in dynamic environments, valuation of securities in capital markets, risk management, and exchange rates, and he is the co-recipient of the first prize from S&P Indices at the first annual SPIVA Awards. Doctor Felix Goltz's research focuses on asset allocation and on indexing and passive investments across traditional and alternative investments. He is also Co-Head of the Indices & Benchmarking programme conducted by EDHEC-Risk Institute.

For more information about this event, please contact: Mélanie Ruiz, Tel.: +33 (0)4 93 18 78 19, E-mail: [EXECeducation@edhec-risk.com](mailto:EXECeducation@edhec-risk.com).

### **About EDHEC-Risk Institute**

Since 2001, EDHEC has been pursuing an ambitious policy in terms of international research. This policy, known as "Research for Business", aims to make EDHEC an academic institution of reference for the industry in a small number of areas in which the school has reached critical mass in terms of expertise and research results. Among these areas, asset and risk management have occupied

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privileged positions, leading to the creation in 2001 of a major research facility: EDHEC-Risk Institute. This institute now boasts a team of 85 permanent professors, engineers and support staff, as well as 45 research associates from the financial industry and affiliate professors.

EDHEC-Risk Institute is located at campuses in Singapore, which was established at the invitation of the Monetary Authority of Singapore (MAS), the City of London in the United Kingdom, and Nice, France. In addition, it has a research team located in the United States. The philosophy of the institute is to validate its work by publication in prestigious academic journals, but also to make it available to professionals and to participate in industry debate through its Position Papers, published studies and conferences. Each year, EDHEC-Risk organises two conferences for professionals in order to present the results of its research, one in London (EDHEC-Risk Days – Europe) and one in Singapore (EDHEC-Risk Days – Asia), attracting more than 2,000 professional delegates.

To ensure the distribution of its research to the industry, EDHEC-Risk also provides professionals with access to its website, [www.edhec-risk.com](http://www.edhec-risk.com), which is entirely devoted to international risk and asset management research. The website, which has more than 55,000 regular visitors, is aimed at professionals who wish to benefit from EDHEC-Risk's analysis and expertise in the area of applied portfolio management research. Its monthly newsletter is distributed to more than 1,400,000 readers.

EDHEC-Risk Institute also has highly significant executive education activities for professionals. In partnership with CFA Institute, it has developed advanced seminars based on its research which are available to CFA charterholders and have been taking place since 2008 in New York, Singapore and London. EDHEC-Risk Institute has an original PhD in Finance programme which, in addition to its highly selective residential track for young talents worldwide, has an executive track for high level professionals who already have master's degrees from prestigious universities and significant industry experience. Complementing the core faculty, this unique PhD in Finance programme has highly prestigious affiliate faculty from universities such as Princeton, Wharton, Oxford, Chicago and CalTech.

[www.edhec-risk.com](http://www.edhec-risk.com)

## About CFA Institute

CFA Institute is the global association for investment professionals. It administers the Chartered Financial Analyst® (CFA®) and CIPM® curriculum and exam programmes worldwide, publishes research, conducts professional development programmes, and sets voluntary, ethics-based professional and performance-reporting standards for the investment industry.

As part of its commitment to professional excellence, it has developed the Advances in Asset Allocation Seminar jointly with EDHEC-Risk Institute specifically for senior-level investment professionals. CFA Institute has more than 111,000 members, of which 12,000 reside in the European Union. Globally there are more than 101,000 CFA charterholders, as well as 135 affiliated professional CFA societies in 58 countries and territories. The CFA Institute global operations centre is in Charlottesville, Virginia, USA, with offices also in London, Hong Kong, Brussels, and New York. More information: [www.cfainstitute.org](http://www.cfainstitute.org)