A Practitioner's Insight on Manager Selection
Speaker: Ms. Geeta Kapadia

What can an investment managers do to optimize their chances of winning new business and retaining client assets? How does an institutional investor carry out the process of initiating a new relationship? What differentiates an investment manager within a large universe of peers? How important is investment performance in the selection decision? Ms. Kapadia will discuss the process and philosophy underpinning one institutional investor’s investment strategy, how it has evolved over time, and what changes might be expected in the future.

CFA Society India is pleased to invite you to meet 

Ms. Geeta Kapadia- Senior Investment Strategist, Yale New Haven Health System

EVENT DETAILS:
DATE: Friday, 09th Aug 2019
TIME: 6:30 p.m. to 9:00 p.m.
VENUE: IBIS Hotel, Aerocity

REGISTRATION:
CFA Society India members: Free
CFA Level 3 Cleared: INR 1000
CFA Program Candidates: INR 1000
Others: INR 1500
Register here: https://in.explara.com/e/speakevent9thaug2019delhi

About the Speaker:

Geeta Kapadia is a senior investment strategist at Yale New Haven Health System, where she leads the team responsible for assets of approximately $3 billion. At YNHHS, she has responsibility for sound management of the System’s investible assets which includes developing prudent and appropriate investment strategy for the System’s portfolios, conducting and evaluating capital markets research, and selecting and monitoring the program’s investment managers.

Geeta holds an A.B. in mathematics from The University of Chicago and a master’s degree in financial markets and trading from the Illinois Institute of Technology. She is a CFA charterholder and holds the UK’s Investment Management Certificate. She is an invited speaker at a variety of investment conferences.