

# CFA Society VBA Netherlands Active Investing Committee Charter

July 2018

## Position of the committee with in CFAVBA

The active investing committee is a part of the CFA Society VBA Netherlands (hereafter named: CFAVBA). All its members are investing- or investing-related professionals who have earned the CFA- or RBA accreditation. Exceptions can be made by the board of the CFAVBA.

## Committee Focus

The main focus of the committee will be active investing. Active investing can be interpreted in many ways, but primarily the committee will focus on the craft of active stock selection. The scope may amongst others contain: fundamental bottom-up, quant, long-term investing, active share/concentrated portfolios, artificial intelligence, position sizing and sustainability.

## Committee purpose

1. The main purpose of the committee is the sharing of knowledge regarding active stock selection. This will mainly be in the form of presentations about investment processes, stock pitches and sharing new academic research.
2. Beside the main purpose, in the case of willing volunteers, there is room for members to focus on organizing an active investing conference (staff of CFAVBA will help) or to publish writing in the VBA Journaal.
3. Also, when called upon, the committee can give its views to relevant bodies regarding sector best-practices.

## Way of working

- Frequency – once every 6 weeks
- Time – 16h Tuesdays and/or Thursdays
- Location – alternate Amsterdam, Rotterdam, The Hague and conference calls
- Size committee – up to 20 members

## Code of conduct

Members of CFA Society VBA Netherlands have made agreements with each other about how they want their professional association and educational institutes to operate. This is laid down in the articles of association, the internal regulations and various other regulations and policy documents.

In addition, members agree to adhere to the Code of Ethics and Standards of Professional Conduct as set forth by CFA Institute.

**Members**

Jeroen Bos: Senior Portfolio Manager, Multi-Manager Equity team, MN

Joris Franssen: Senior Investment Manager at Kempen & Co

Oskar Geldof: Institutional Sales Director at Fidelity

Jan van der Hout: Senior Portfolio Manager equities at ASR

Herman Kleeven: Head Focus Equities at APG

Arjan Palthe: Senior Portfolio Manager equities at NN IP

Dimitri van Toren: Senior Portfolio Manager equities at NN IP

Masja Zandbergen: Head ESG Integration at Robeco

Koen Ronda: Portfolio Manager at IBS Capital Management

Joram Kok: Research Analyst at Pelargos Capital

Marco Skibinski: Quantitative Equity Strategist at NN IP

Melissa Lin: Assistant Professor at Erasmus University Rotterdam

Yentl Blom: Investment Associate at Dasym Capital

Daan Peeters: Investment Associate at Dasym Capital

Yanxin Liu: Equity Analyst EM at Robeco