



CFA Society
San Diego

LET'S MEASURE UP™

3:30
PM

Opening Remarks
- David Allen, CFA
Board Chair, University Relations

3:45
PM

First Presentation

5:45
PM

Appetizers & Drinks

6:15
PM

Announcement of Winners
& Trophy Presentation

7:00
PM

Conclusion

2020 INVESTMENT RESEARCH CHALLENGE

25 FEBRUARY | 3:00-7:00PM | USD, KIPJ THEATER



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Our Judges



JAY WINSHIP, CFA

Mr. Winship is the President and Principal of Pacific Point Capital LLC. Previously, Mr. Winship was a Principal, Senior Managing Director, and Investment Committee member of Relational Investors. While at Relational, Mr. Winship managed all aspects of Relational's investment strategy and led the investment team responsible for idea generation, stock selection, and investment strategy in various industry sectors. Mr. Winship has over 20 years of investment experience including knowledge in the areas of investment management, investment research, securities and business valuation, corporate governance, mergers, acquisitions, investment banking and real estate. Mr. Winship was also responsible for managing and overseeing Relational's marketing and client services functions. He served on the board of Esterline Technologies (ticker "ESL") and has served on the boards of various private companies. Mr. Winship holds a bachelor's degree in finance from the University of Arizona and an MBA from the University of California, Los Angeles. He is a Certified Public Accountant and holds the professional designation of Chartered Financial Analyst.



KENNETH LITTLE, CFA

Ken Little is a limited partner with the global investment advisory firm of Brandes Investment Partners, L.P. where he is responsible for leading the firm's overall research efforts and serving as a member of the firm's Global Investment Committees. Prior to joining Brandes, Ken worked as a senior accountant with the public accounting firm of KPMG. He earned his MBA from The Fuqua School of Business at Duke University and his BS in accounting from the University of La Verne. Ken is a Certified Public Accountant and a member of the CFA Society of San Diego.

2020 Research Challenge



HORACIO A. VALEIRAS, CFA

Mr. Horacio Andres Valeiras is the President and Principal of HAV Capital, LLC. He founded HAV Capital after previously working at Allianz Global Investors Capital LLC as the Managing Director, Chief Investment Officer, Portfolio Manager and Member of the Management Board at Allianz. Previously, Mr. Valeiras was responsible for developing and overseeing the global core equity and European tactical asset allocation programs at Morgan Stanley Investment Management. From 1992 to 1996, he was a partner at Miller, Anderson & Sherrerd, responsible for International Equities and Asset Allocation. Mr. Valeiras began his career in the investment management industry as the European Technology Analyst and non-US Strategist at Credit Suisse First Boston based in their London office. Mr. Valeiras obtained an M.B.A. degree in Finance from the University of California in Berkeley, a master's degree in Chemical Engineering from the Massachusetts Institute of Technology, and a B.S. degree in Chemical Engineering from Virginia Tech.

COMPLIMENTARY STUDENT MEMBERSHIP - YOU'RE INVITED!

Thank you for participating in our 2020 Investment Research Challenge! Your time and commitment to this pursuit was inspiring. As a small token of our appreciation, please consider accepting a complimentary one-year student membership to our society.

To take advantage of this unique offer, email our Managing Director at staff@sandiego.cfasociety.org with your:

- 1) Full name
- 2) Permanent email address

