

ATLANTIC UPDATE



Term: Fall | Issue VI | Date: November, 2023

PRESIDENT'S UPDATE FROM SEATTLE SLC

In late September, Ying Wu, CFA Society Atlantic Canada Vice President, and Jessie Zheng, CFA Society Atlantic Canada Regional Administrator, attended the 2023 Society Leadership Conference in Seattle. It was a wonderful opportunity to meet with other society leaders and discuss ways to collaborate to bring more value to our local members. There was also much discussion around changes to the CFA Program curriculum to ensure candidates are learning the most up-to-date concepts and practices for roles in today's evolving investment industry. There were also new CFA Institute research and policy center and DEI initiatives. Overall, there are many positive changes coming from the CFA Institute and member feedback is a crucial component of successfully implementing these changes so please share thoughts and suggestions with your local representatives.



UPCOMING EVENTS

FALL UPDATE & OUTLOOK FOR 2024 AND NEW CHARTER HOLDER RECOGNITION

Diversification or Di-worsification? Canadian Investors Have Been Drinking Too Much Kool-Aid

November 15, 2023
Reception to Include Food and Drinks
5:30pm to 7:30pm
Delta Hotel,
225 Woodstock Road
Fredericton, NB E3B 2H8

[Register for this event here!](#)

2023 CFA SOCIETY ATLANTIC CANADA MEMBER SOCIAL AND NEW CHARTER HOLDER RECOGNITION

November 23, 2023
5:30pm to 7:30pm
Halifax Club,
1682 Hollis Street
Halifax NS B3J 1V7

RESEARCH & ETHICS CHALLENGE AND VALUATION CONFERENCE

Valuation Conference:

February 16, 2024

St Mary's University

Research Investment Challenge:

February 17, 2024 – 9am

Halifax Club, 1682 Hollis Street, Halifax NS B3J 1V7

Ethics Challenge:

February 24, 2024 – 9am

Halifax Club, 1682 Hollis Street Halifax NS B3J 1V7

For both of the upcoming challenges, we encourage society members to attend and support the students.

We are looking for volunteers to assist with judging these events.
Please reach out to cfaatlantic@cfaatlantic.com

UNIVERSITY OUTREACH

As we approach the New Year, our board members will be visiting Universities in person, as well as hosting a variety of informational virtual sessions. This will provide students an opportunity to connect with current CFA Charterholders in the region to discuss changes to the program curriculum, eligibility and career opportunities locally and abroad. Recently, Jonathan MacLanders, Stephen Moore and Colin Marinelli visited Saint Mary's University and met with students across all disciplines. This allowed our board members to bring awareness to the program and aspiring candidates to build their respective networks. Please stay tuned as we announce our next round of meet and greets.



SAVE THE DATE!

Tuesday, January 16, 2024
Fixed Income Lunch and Learn
sponsored by PIMCO (registration
will open soon)

Please join us for a timely conversation with Max Gelb, CFA, from PIMCO'S Client Solutions & Analytics team (CS&A) to explore some of the most press challenges faced by investors today. We'll break down tangible ideas for meeting these challenges head-on, utilizing a research-driven, analytical approach.

This session will explore:

1. The role of fixed income in the current environment, and a structural way to think about the risk of equity and bonds.
2. The potential opportunities to best optimize allocations to private debt; a research-driven approach to illiquid allocations.
3. Deep dive to find ways to measure illiquidity within a private portfolio and approaches for managing the uncertainty of commitment pacing.



32ND ANNUAL FORECAST DINNER

Tuesday, May 21, 2024
(more details to come in the New Year)

CONGRATULATIONS TO OUR NEWEST CHARTERHOLDERS

Mohamed Yousif
Mohamed Mahmoud
Yuxin Chen
Alexander Darren Robert MacBain
James Anthony Power
Maria Elizabeth Wagner
Lifang Hao
Christopher William MacRae
Yuanqing Lu
Michelle Marie MacDonald
Logan James Toth
Keith Thomas MacDonald
James Peter Flemming
Zacharie LeBlanc
Jordan Joseph Russell
Yijie Bu
Melanie Bastarache
Megan Elizabeth Martin
Chantel Pearce

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CONTACT US

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