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**CFA Society  
Austin**



*Annual Dinner*

*Thursday, February 8, 2024*

*AT&T Hotel and Conference Center*

*Thank you for attending!  
Please take our brief survey:*



## President's Welcome

On behalf of CFA Society Austin board members we would like to welcome you all to this year's Annual Dinner event. During the last Annual Dinner, several speakers shared their views on a variety of topics including the US economy, central bank policy, and capital market predictions to name a few. While all of these topics are current to today, with ever evolving financial and global markets a lot has occurred over the last year. The unpredictable collapse of Silicon Valley Bank caused ripple effects throughout the banking sector, yet market turbulence was short lived. During the last year there has been debates of whether the US economy will fall into a hard-landing vs. a more favorable soft landing scenario. Another key theme has been whether inflation is transitory vs "sticky". At the time of writing this note the market is pricing in 5 rate cuts for 2024, to an implied Fed Fund rate of under 4%; less than where short term rates were this time last year. Equity markets were quite volatile over the last year and the explosive growth in trading volumes of zero-day to expiration options has received more attention. The corporate credit markets are becoming more interesting given the approx. \$7 trillion in corporate debt (rated by S&P Global ratings) maturing in 2024-2026. Geopolitically, the Israel-Hamas conflict (and the continuation of the Russia-Ukraine war) has caused humanitarian and economic effects felt across multiple geographic regions.

CFA Society Austin remains committed to providing value to all our members and to best serve the local financial community. CFA Society Austin has approx. 700 members and growing. CFA Society Austin will continue to serve members with high quality educational programming and networking events, in addition to other outreach initiatives that promote the benefits of earning a CFA Designation.

On behalf of CFA Society Austin board members and staff, thank you to all the attendees. We hope you enjoy this evening's festivities and speakers. Thank you to all of our sponsors that have contributed to the Annual Dinner as well as our annual sponsors. We truly appreciate your support; with it we are able to host events such as tonight as well as throughout the year.

*Courtney Dunn, CFA  
CFA Society Austin President 2023-2024*

## Annual Dinner Committee

Jack Macdowell, Jr., CFA  
*Palisades*

Panayiotis Lambropoulos, CFA, CAIA, FRM  
*Employees Retirement System of Texas*

## Upcoming Events

**February 21**  
February Luncheon

**February 29**  
February Breakfast & Fireside Chat

**March 20**  
March Luncheon

**April 11**  
April Special Luncheon

**April 17**  
April Luncheon

**May 2**  
Cinco De Mayo Social Hosted by AB  
Private Credit Investors

**May 15**  
May Luncheon

**June 18**  
Annual General Meeting

**June 19**  
End of Year Happy Hour & Fireside Chat  
with Anthony Scaramucci

## Parking Validation

Parking validation stickers will be provided for those parking in the AT&T Hotel and Conference Center



## Post About the Event

Use **#CFAAustin** in your social media posts

## Leadership

President

**Courtney Dunn, CFA**  
*ERS Texas*

Vice President – Programs

**Maddie Minnaganti, CFA**  
*MIP North America*

Secretary

**Griffin Watkins, CFA**  
*Dimensional Fund Advisors*

Treasurer

**Jennie Sanders, CFA**  
*TIAA, FSB*

## Mission

**Lead the Austin investment profession by promoting the highest standards of ethics, education, and professional excellence for the ultimate benefit of our members and the community.**

## Evening Program

**6:30:** Dinner service begins

**6:45:** Welcome from CFA President and Chair of Annual Dinner

**7:00:** Macroeconomic Environment & Policy Update

**7:30:** Fireside Chat: Implications of Artificial Intelligence

**8:20:** Q&A

**8:45:** Dinner concludes

## Event Chair Welcome

Welcome to the CFA Society Austin 2024 Annual Dinner!

As we come together for our annual celebration of Austin's vibrant investment community, we extend a warm welcome to all our Society members and distinguished guests. Tonight promises to be an enriching experience, featuring:

- A keynote address by Julia Coronado, Ph.D., founder of MacroPolicy Perspectives, who will provide insights into the latest macroeconomic environment and policy trends shaping our industry.
- An engaging fireside chat on the transformative role of artificial intelligence in investment and society, moderated by John D'Agostino of Coinbase, with insights from Dr. Harry Mamaysky of QuantStreet Capital, and Gary Kazantsev of Bloomberg.
- An interactive Q&A session, offering you the opportunity to delve deeper into tonight's topics.

We are excited to host a night of thought-provoking discussions, networking, and learning.

Thank you for being an integral part of our community!

*Jack Macdowell, Jr., CFA*  
*Panayiotis Lambropoulos, CFA, CAIA, FRM*  
*Annual Dinner Co-Chairs*

## Guest Speakers



**JULIA CORONADO, PH.D.**

*President and Founder*

*MacroPolicy Perspectives*

Dr. Julia Coronado is founder of the economic research firm MacroPolicy Perspectives and a Clinical Associate Professor at the McCombs School of Business. Julia received her Ph.D. in Economics from the University of Texas then served as an economist at the Federal Reserve Board of Governors for eight years forecasting the US economy and publishing scholarly articles on pension finances and market valuations, retirement saving, and digital currency and monetary policy. She currently serves as President of the National Association of Business Economists, and serves on the Board of Directors of Robert Half International and Dynex Capital, the Advisory Boards of the Bureau of Economic Analysis, the Pension Research Council at the Wharton School, the Cleveland Fed's Center for Inflation Research, and Palisades Group.



**JOHN D'AGOSTINO**

*Senior Advisor, Strategic*

*Partnerships*

*Coinbase*

John oversees strategic partnerships for Coinbase Institutional. Former Head of Strategy, New York Mercantile Exchange. Lecturer at Oxford, MIT, and Columbia Universities. Chair of the UK Consulate Financial Services Working Group and AIF Global Financial Innovation Institute. John has served as a director in a wide range of industries, with notable expertise is in technology driven companies and investment vehicles characterized by complex strategies and asset classes including finance (derivatives, structured credit, direct lending, high frequency/quant and similar strategies), consumer (credit scoring, transportation) and general technology enabled companies. A cum laude graduate of Williams College, John received a Master's degree in Business Administration from Harvard Business School, and he also studied Politics, Philosophy and Economics at Oxford University.



**DR. HARRY MAMAYSKY**

*Chief Investment Officer, Head of Research*  
*QuantStreet Capital*

Dr. Harry Mamaysky is a Professor at Columbia Business School, where he is the Director of the Program for Financial Studies. Harry's research focuses on the application of computational linguistics and machine learning techniques to investing. Harry is also a partner at QuantStreet Capital, which offers its clients model portfolios, financial advice, and investing services through separately managed accounts. Harry is a frequent industry and academic speaker. Prior to his time at Columbia, Harry spent years in finance practice, rising to the position of senior portfolio manager at Citigroup, where he later served on the firm's Risk Executive Committee. Harry was a professor at the Yale School of Management, which he joined after earning his PhD in Finance from the Massachusetts Institute of Technology. He holds BS and MS degrees in computer science and a BA in economics from Brown University.



**GARY KAZANTSEV**

*Head of Quant Technology Strategy*

*Bloomberg*

Gary is the Head of Quant Technology Strategy in the Office of the CTO at Bloomberg. Prior to taking on this role, he created and headed the company's Machine Learning Engineering group, leading projects at the intersection of computational linguistics, machine learning and finance. Prior to joining Bloomberg in 2007, Gary had earned degrees with distinction in physics, mathematics, and computer science from Boston University. He is engaged in advisory roles with FinTech and Machine Learning startups and has worked at a variety of technology and academic organizations over the last 20 years. He is a member of the KDD Data Science + Journalism workshop program committee and the advisory board for the AI & Data Science in Trading conference series. He is also an adjunct professor at Columbia University, and a co-organizer of the annual Machine Learning in Finance conference at Columbia University.