



Chinese Finance Association of America

美国华人金融协会

CFAA Shanghai Chapter 2013-2014 Events

January 9, 2014 – CFAA Shanghai Chapter hosted an event with the topic of “What Wall Street Missed” by Mr. Jeff Lu.



After unprecedented monetary easing by central banks, global economy stabilized and started to grow. Equity market rallied, for most of markets. What should Chinese investors position themselves? And should you invest in USA market or keep your money in China market?

Buy stocks? Look at US stock market will make many regret that they were not aggressive enough since 2009. The long rally since then has set many index into new high. Should you buy or should you short US stock? Or should you buy a fund and trust the professionals? Welcome you all to this join this discussion about the outlook of global equity market.

Buy gold? After hitting a record high in 2011, gold is in a bear market. Many people are wondering whether they should buy some gold for preservation of wealth. Let's have a discussion of how to evaluate gold and how to invest in gold.

陆旻，1998 年毕业于耶鲁大学商学院。1996 年从耶鲁大学医学院获细胞生物学科学硕士和哲学硕士。曾就职于富兰克林，AIG 和华夏基金等全球大型资产管理公司。借用研究自然科学的严谨方法，陆旻对国际上许多国家，行业和公司进行了深入冷静的研究。作者有丰富的研究全球生物制药，能源，材料，工业和电子技术领域的经验。他曾前往俄罗斯，巴西，土耳其，科威特，智利，阿联酋，加拿大，澳大利亚，美国，英国，法国，比利时，瑞士，进行公司考察，会见公司管理层。他所管理的全球股票投资组合，多年来显著地优于相应的国际指数基准。著有《华尔街的误区》一书。



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Jeff Lu received his MBA degree in Finance from Yale School of Management, and Master of Science and Master of Philosophy degree in Cell Biology from Yale School of Medicine. Mr. Lu has worked as a research analyst and portfolio manager with Franklin Investments, AIG and China Asset Management, each managing multi-billion dollar assets for retail and institutional clients. Using the method of evidence-based scientific research, Jeff conducted his search for investment ideas in a similar fashion. Once an experienced biotech and pharmaceutical industry analyst, Jeff has developed his skill and knowledge in investing in energy, material, industrial and technology sectors. He traveled to Russia, Brazil, Turkey, Kuwait, Chile, UAE, Canada, Australia, US, Britain, France, Belgium, Swiss to visit companies and meet with management. He successfully managed global equity portfolio for clients that significantly outperformed corresponding benchmark in recent years. He authored the book *The Wall Street Missed*.

About CFAA and CFAA Shanghai Chapter

Chinese Finance Association of America (CFAA) is an independent not-for-profit, non-partisan organization committed to promoting educational and cultural exchange among finance professionals between the United States and Greater China through facilitating communication and the exchange of ideas in the financial industry. Incorporated and headquartered in Chicago, Illinois, CFAA is aimed to serve Chinese finance professionals and others who are interested in the financial industry of Greater China. Please visit our website www.ChineseFinanceAssociation.org for more information about CFAA. To become a CFAA member, or to renew your CFAA membership and make your membership payment, please go to the [membership section](#) on our website. If you are interested in the volunteering opportunities at CFAA, please submit the [volunteer and staff application form](#). For global career opportunities in finance, please visit our newly launched [Online Job Center](#) through our partnership with one of the leading global career placement companies eFinancialCareers.com.a