



# Chinese Finance Association of America

美国华人金融协会

***Chinese Finance Association of America cordially invites you  
to join us for a panel discussion***

## **"Understanding Quantitative Equity Investment"**

The quantitative investment approach in the equity market has become increasingly popular in recent years as the demand for exploiting alternative returns and managing macro and micro risks is increasing. From this panel discussion, you will have the opportunity to learn from seasoned quantitative investors on a wide range of topics including answers to the following questions: What is Quantitative Equity Investment? What are the common strategies and methods in Quantitative Equity Investment? What are the recent trends in light of the financial crisis and current market volatility? They will also discuss the necessary qualities and qualifications of prospective candidates seeking a quantitative investment career. This event is also a great opportunity for you to network with other finance professionals and exchange ideas on the industry and career development.

**Tuesday, June 22, 2010**

**5:15 p.m. - 7:00 p.m.**

The Union League Club of Chicago  
Tudor Room, 7th Floor  
65 West Jackson Blvd  
Chicago, Illinois

### **Featured Panelists**

**Wei Li, Ph.D., CFA** – EVP, Director of Research, Thomas White Asset Management  
**Jiayu Li, Ph.D., CFA** – Executive Director, Portfolio Manager, UBS O'Connor  
**Kai Liu, CFA** – Director, Quantitative Analyst, Chicago Equity Partners, LLC

**Agenda:** 5:15 - 6:00pm Registration and networking  
6:00 - 6:45pm Panel Discussions  
6:45 - 7:00pm Q&A and Conclusion

**Fee:** CFAA Members - \$8, Non-CFAA Members - \$13; Walk-ins - \$18

### **Pay Online Now**

- Note:**
- Business casual attire is required, shirts with collar, no jeans and sneakers allowed.
  - No refunds will be issued unless the event is canceled.
  - CFAA members are defined as those who submitted CFAA membership forms and fees with confirmation from CFAA Board of Directors.



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## **Panelists' Biography:**

**Wei Li, Ph.D., CFA** - Executive Vice President, Director of Research, Thomas White International, Ltd.

Dr. Wei Li is currently Executive Vice President and Director of Research of Thomas White International, Ltd., a private investment management and research firm in Chicago, Illinois. Wei is a member of Thomas White International's management team, overseeing its research department. His responsibilities include researching and implementing stock selection models, portfolio construction, asset allocation and performance attribution as well as new product development. Wei is also responsible for the research and portfolio management of the firm's investment in the Asian equities markets. Prior to joining TWI, Wei held teaching and research positions with McGill University in Canada and Renssenlaer Polytechnic Institute in New York.

Wei obtained his Ph.D. in mathematics from Purdue University in Indiana and MS from Nanjing University. He is a member of CFA Institute and served on the curriculum committee of the CFA Institute.

**Jiayu Li, Ph.D., CFA** - Executive Director, Portfolio Manager, UBS O'Connor

Jiayu Li is an Executive Director and Portfolio Manager at UBS O'Connor, based in Chicago. Her primary responsibilities include research and management of quantitative equity strategies.

Ms. Li has a Ph.D. in Statistics from the University of Chicago. She is a CFA charter holder.

**Kai Liu, CFA** - Director, Quantitative Analyst, Chicago Equity Partners, LLC

Mr. Liu is a member of Chicago Equity Partners' quantitative analysis group. He is responsible for the research and implementation of the firm's proprietary quantitative model. He has more than twelve years of industry experience. Prior to joining the firm, Mr. Liu held positions at Citadel Investments and Reuters Group. He holds a bachelor's degree in computer science from the University of Texas, a master's degree in financial mathematics from the University of Chicago, and a master's degree in computer science from Illinois Institute of Technology. He holds the Chartered Financial Analyst (CFA) designation and is a member of the CFA Institute and the CFA Society of Chicago. He is also a member of the Chicago Quantitative Alliance (CQA).

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## **About CFAA**

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 feel free to contact CFAA should you have any questions:

[info@ChineseFinanceAssociation.org](mailto:info@ChineseFinanceAssociation.org). If you would like to become a CFAA member, please fill out the [membership application form](#) online. If you are interested in the volunteering opportunities at CFAA, please submit the [volunteer and staff application form](#).