



Chinese Finance Association of America

美国华人金融协会

Chinese Finance Association of America (CFAA) and DePaul University Kellstadt Finance Community (KFC) cordially invite you to join us for

Fundamental Analysis and Stock Picking Workshop

Featuring



Vivian Lin Thurston, CFA
Vice President, Consumer Sector Head
Calamos Investments

Program Description: Fundamental analysis is proven to be an effective investment approach to consistently add value to actively managed investment strategies according to both empirical and academic studies. What are the key elements and aspects of an effective fundamental analysis? How to pick stocks based on fundamental analysis? What are the methods to evaluate a stock? How to formulate investment thesis, forecast earnings and identify catalysts? How to think about risk reward and position sizing? What are the key differences between fundamental investing and other investment methods? As part of CFAA's investment management event series, this workshop is designed to cover these topics related to fundamental analysis in a highly interactive and detailed way. [Each event participant is encouraged to prepare a brief analysis on Ctrip \(Chinese online travel agency, ticker CTRP\) before coming to the workshop.](#)

Speaker's Bio: Vivian Lin Thurston, CFA is currently Vice President, Consumer Sector Head at Calamos Investments, responsible for fundamental equity research and stock selection for the Non-US Consumer sectors. She is also the President of CFAA. Vivian has been working in the investment management industry since the late 1990s including a 13-year experience as a buy-side analyst at UBS Global Asset Management previously. At UBS, she was responsible for investment research and stock selection for various sectors in both the US and Emerging Markets. She also had a brief experience working at the fund of hedge



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funds industry responsible for hedge fund manager sourcing and research at Mesirow Financial prior to joining Calamos. Vivian received her bachelor's degree from Peking University and M.A. and M.S. degrees from the University of Illinois at Urbana-Champaign. Vivian is currently a member of the CFA Institute and CFA Society of Chicago.

Saturday, March 15, 2014

2:00 p.m. – 4:00 p.m.

Barnes & Noble DePaul Center, Room 8010
1 E Jackson Blvd, Chicago, IL 60604

Agenda: 2:00 – 2:30pm Registration
2:30 – 4:00pm Workshop including Q&A

Fee: CFAA Member – \$8; Non-CFAA Member with online payment - \$13; Walk-ins - \$18
DePaul Kellstadt Finance Community members please refer to the KFC event notice for fee schedule and must pre-register at depaul.kfc@gmail.com.

[Pay Online Now](#)

Note:

- [Business casual attire is required, shirts with collar, no jeans or 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.

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 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.

About KFC

Kellstadt Finance Community (KFC), the only official group for master-level finance students at DePaul Kellstadt Graduate School of Business. It was founded in May, 2011 by Joyce (Xiran) Chen and aims to help students build up a bridge to the real finance world. Basically, KFC has one topic in the financial industry per month and arranges networking events or seminars accordingly.