

# Are Active Funds More Likely to Outperform in a Volatile Market?



## **Priscilla Luk**

**Managing Director of Global Research & Design, APAC  
S&P Dow Jones Indices**

Priscilla Luk serves as Managing Director of Global Research & Design, APAC, at S&P Dow Jones Indices (S&P DJI). She is responsible for the conceptualization and design of new indices using a combination of analytical, commercial, and regulatory considerations. Priscilla also regularly publishes research on new and existing products, and represents S&P DJI at media engagements, conferences, and other client events.

Prior to joining S&P DJI in 2012, Priscilla spent over ten years in equity research providing analysis on asset allocation and equity investment strategies. Previously, Priscilla was an Asian equity strategist with Deutsche Bank AG and also served as a partner and the director of research at First Horse Capital, a global equity hedge fund management company. Prior to this, Priscilla worked as global and Asian strategist at Mirae Asset Securities.

Priscilla also worked as a global equity strategist and Asian equity strategist at Citigroup Global Markets. She joined Citigroup from CLSA Asia Pacific Markets where she was a quantitative research analyst.

Priscilla started her career in the quantitative research division at Credit Suisse in 2001. Priscilla graduated with a B.Sc. in Quantitative Finance from the Chinese University of Hong Kong.



## **Christian Beltrame**

**Director  
RCB Advisors**

Christian Beltrame is a founding partner of RCB Advisors, specializing in providing financial and superannuation advisory services to the specific needs of individuals, rather than the mass market. Christian brings almost 20 years of experience to RCB Advisors, spanning across the accounting and wealth management industries.

Christian's specialty lies in providing financial and superannuation advisory services to the specific needs of individuals rather than the mass market. This can include providing one-off or ongoing advice about the most appropriate superannuation vehicle, investment and risk management strategies. This usually dovetails into other financial advice issues for clients including estate planning, tax planning and even financial coaching and education. Often it involves providing Self-Managed Superannuation Fund (SMSF) assistance for those that need some guidance.

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### **Shaun Wurzbach**

**Managing Director, Global Head of Wealth Management Channel  
S&P Dow Jones Indices**

Shaun Wurzbach is Managing Director and Global Head of Wealth Management Channel at S&P Dow Jones Indices. The wealth management channel focuses on increasing wealth managers' awareness of and preference for index-based solutions.

Shaun joined S&P DJI in 2007 as head of the program management office. Shaun led the New York and London-based index calculation teams in 2008, culminating in a reorganizational effort that resulted in a combined international index analysis and production group.

Prior to joining S&P DJI, Shaun was a U.S. Army officer with over 20 years of active duty service, including combat operations as a reconnaissance platoon leader in Desert Shield and Desert Storm. Shaun was awarded the Bronze Star Medal and the Legion of Merit.