

Harnessing Active Vs. Passive Findings During Times of Market Turbulence



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.



David Haintz

**Principal
Global Adviser Alpha**

David Haintz is a Certified Financial Planner (CFP) and a past director of the Financial Planning Association of Australia (FPA), in which time he was instrumental in the push for professionalism. He has had a 28 year career with his own firm and subsequently became a founding director of Shadforth Financial Group, with over 100 advisers; which was taken over in 2014 for \$670m - at the time \$13b FUM, \$165m revenue and \$58m EBIT.

David was the sixth adviser in Australia to be awarded a Fellow of the FPA and served on the FPA Disciplinary Committee for seven years, the FPA Professionalism Committee for six years and was a National Judge at the FPA's inaugural Value of Advice Awards. He is a founding trustee of the Future2Foundation, lectured at the FINSIA for six years and has been a member of the international Financial Planning Standards Board – Developing Markets Practice Management Working Group.

He has presented at international conventions such as the UK Institute of Financial Planning and the South African Institute of Financial Planning conferences; in 2017 had consulting engagements in 18 countries including diverse locations such as the UAE, Germany, India and Norway. David remains the only adviser in Australia to be awarded the two prominent awards - Australian Financial Planner of the Year (2005) and Australian Best Practice of the Year (2004). In 2017, David launched a book titled *The Life-First Advisor – How the new financial coach connects 'money' with 'meaning'*. Having departed Shadforth in 2015, he has established Global Adviser Alpha – a B2B consultancy with a passion for helping leading global advice businesses become world class and achieve outstanding result for all stakeholders.



Stuart Magrath

**Senior Director, Head of Channel Management – Australia and New Zealand
S&P Dow Jones Indices**

Stuart Magrath is Senior Director, Channel Management, Australia & New Zealand at S&P Dow Jones Indices. He focuses on the current and future financial aspects of the accumulation and draw-down phases of the retirement community of both countries. Stuart services the needs of different influencers including financial advisors, accountants, and SMSF members.

Stuart started his career with KPMG in their Tax Advisory business in Sydney, followed by a number of roles in publishing, both traditional and online, including with the Sydney Futures Exchange prior to its merger with the ASX.

In 2001, Stuart made the move into retail financial services. Stuart is a graduate of the University of NSW, Sydney, with Bachelor degrees in both Commerce (Accounting) and Law.

Stuart is also a graduate of the Australian Institute of Company Directors.