

Simplifying Risk Management with Index-Based Liquid Alternatives



Garrett Glawe, CFA
Senior Director, Asset Owners Channel
S&P Dow Jones Indices

Garrett Glawe is Senior Director, Asset Owners Channel at S&P Dow Jones Indices (S&P DJI), responsible for institutional investor coverage. Garrett manages relationships with more than 60 clients, who are collectively responsible for over USD 2 trillion in assets. He regularly presents on S&P DJI's research and index innovations, spanning active versus passive management, factor investing, U.S. and international small-cap equities, the importance of benchmarks across asset classes, and environmental, social, and governance (ESG).

Prior to joining S&P DJI in 2015, Garrett was a Vice President within the Risk Management Analytics business at MSCI for four years. From 2008-2011, he worked for a boutique asset manager called Ziegler Capital Management. Garrett started his career in the equipment finance industry in 2002.

Garrett earned his MBA from DePaul University and bachelor's degree in finance and MIS from Miami University. He is a CFA charterholder and a member of the Board of Directors of the CFA Society Chicago.



James Hobbs, CFA
Senior Manager, Investment Strategies
NISA Investment Advisors

James is a member of the team that develops proprietary financial modeling and engineering tools used throughout NISA. He also supports NISA's Strategic Portfolio Management Group which is charged with maintaining hedge strategies including completion portfolios.

James joined NISA's Investment Strategies Group in 2013. Prior to NISA, he worked as an analyst for Puget Sound Energy where he developed strategies to hedge the firm's exposure to energy markets. He earned a BA in Economics and an MS in Computational Finance and Risk Management from the University of Washington.



Chris Solarz, CFA
Managing Director
Cliffwater LLC

Chris is a Managing Director at Cliffwater LLC covering global macro and relative value strategies on the hedge fund research team. Prior to joining Cliffwater in 2011, Chris was a Senior Analyst at SAIL Advisors, where he focused on manager selection and due diligence as Head of Research for tactical trading and relative value strategies. Previous experience includes working for ING Investment Management, Antarctica Asset Management, Societe Generale Barr Devlin, and CIBC World Markets.

He earned a BA in Economics and Anthropology from the University of Pennsylvania and a MComm in Finance from the University of New South Wales, where he was a Federation Scholar. Chris is a Certified Public Accountant, holds the Chartered Alternative Investment Analyst® designation, the Chartered Financial Analyst® designation, and is a member of the New York Society of Security Analysts. Chris has broken 7 Guinness World Records, and has run marathons on all 7 continents and in all 50 US states.



Rupert Watts, CFA, CAIA
Senior Director, Strategy Indices
S&P Dow Jones Indices

Rupert Watts is Senior Director, Strategy Indices at S&P Dow Jones Indices. His field focuses on alternate beta strategies, including factor-based indices, dividends, and volatility, as well as quantitative, thematic, and asset-allocation strategies. In his role, Rupert works closely with the sales, marketing, and Global Research & Design departments to bring new ideas to market.

Prior to his current role, Rupert worked at Deutsche Bank for almost 11 years, with the majority of this time dedicated to research and product development within quantitative investment strategies (QIS), with stints on the buy side and sell side. While in QIS, Rupert played a lead role in the successful launch of a risk premia platform, developing strategies across multiple asset classes and managing portfolio mandates for institutional clients.

Rupert is originally from the United Kingdom and earned a bachelor's degree in business and finance from the University of the West of England, Bristol. Rupert is both a Certified Financial Analyst (CFA) and a Certified Alternative Investment Analyst (CAIA).