S&P Dow Jones Indices

A Division of S&P Global

Navigating Markets with Factors: From Quality to Equal Weight

Matthew Bartolini

Head of SPDR Americas Research
SSGA

Matthew is a Managing Director at State Street Global Advisors and Head of SPDR® Americas Research. He manages a team responsible for the product research and analysis of SPDR ETFs, and the development of market outlooks, investment themes, and portfolio implementation ideas to help clients understand the market landscape and achieve their desired investment outcomes.

Ryan McCormack

Senior Factor and Core Equity Strategist
Invesco

Ryan McCormack is Senior Factor and Core Equity Strategist for Invesco's family of exchange traded funds (ETFs). In this role, he is responsible for promoting the adoption of Invesco Equity ETFs by discussing implementation strategies, creating thought leadership content, and engaging in media opportunities with Bloomberg, The Wall Street Journal, The Financial Times, and others. Mr. McCormack frequently speaks at top industry conferences and has a weekly segment on Nasdaq's Trade Talks.

Mr. McCormack joined Invesco when the firm combined with Oppenheimer Funds in 2019. Prior to his current role, he was a QQQ strategist. Before joining the firm, Mr. McCormack was a portfolio strategist at Bank of America Merrill Lynch. Previously, he was a financial advisor at Morgan Stanley Smith Barney.

Mr. McCormack entered the financial industry in 2007. Mr. McCormack earned a BA degree in economics from Johns Hopkins University. He holds the Series 7, 66, and 24 registrations.

Andrew Neatt

Private Investment Advice
TD Wealth

Prior to joining TD Wealth Private Investment Advice, Andrew worked with MD Private Investment Counsel for 18 years and spent 8 years an an Investment Advisor with a number of Canadian financial institutions, serving high net worth clients.

Andrew graduated from Saint Mary's University with a Bachelor of Commerce and a Bachelor of Arts and also holds the Certified Financial Planner (CFP®), Chartered Investment Manager (CIM®) and Fellow of the Canadian Securities Institute (FCSI®) designations.

Joseph Nelesen, Ph.D.

Senior Director, Index Investment Strategy
S&P Dow Jones Indices

Joseph Nelesen is Senior Director, Index Investment Strategy at S&P Dow Jones Indices (S&P DJI). The group provides research and commentary on S&P DJI’s entire product set, including U.S. and global equities, commodities, fixed income, and economic indices.

Prior to joining S&P DJI in 2022, Joseph worked at BlackRock, where he headed iShares Institutional Factors Strategy and held roles in exchange-traded product research and development. Joseph previously worked in mergers and acquisitions and corporate investment banking with Citigroup and Bear, Stearns & Co.

Joseph holds a Ph.D. from Northwestern University, an MBA from the Kenan Flagler Business School at University of North Carolina, and a Bachelor of Arts with honors from the University of California at San Diego.