

Press release

London, UK, and Nice, France, September 11, 2008

## **CFA Institute and EDHEC Business School Make Investment Management Seminar Bi-Annual**

CFA Institute and the EDHEC Risk and Asset Management Research Centre have extended their partnership in executive education events to now include a Bi-Annual Seminar in the Advances in Asset Allocation. Seminars will now be held in both London and New York.

The Advances in Asset Allocation Seminar series present the latest research advances in asset allocation and clarify the distinction between true innovation and mere marketing claims in emerging industry trends. This provides senior investment professionals a unique opportunity to gain an in-depth appreciation of the concepts and techniques that will shape the future of investment management. It equips participants with practical tools and novel investment approaches to improve asset allocation processes and design new products.

The event's inaugural edition attracted practitioners from 20 countries and five continents and sold out in a short space of time. Against the backdrop of this success, the leading association of investment professionals and the premier European centre for applied research into asset allocation have agreed to make the seminar bi-annual, to take place in both London and New York.

The next session of the seminar will take place 17-19 November in London and will feature instructors with established reputations for bringing together academic expertise and industry experience:

- Professor Lionel Martellini, Scientific Director of the EDHEC Risk and Asset Management Research Centre, will present solutions to optimise portfolio construction in a world that does not conform to the tenets of modern portfolio theory and apply dynamic risk budgeting techniques to the design of long-only absolute return funds and new liability-driven investment products.
- Professor Noël Amenc, Director of the EDHEC Risk and Asset Management Research Centre, will impart research-based insights in the area of fundamental indices® and socially responsible investing and present new forms of benchmarks and indices.

Nitin Mehta, CFA Institute Managing Director for Europe, Middle East, and Africa (EMEA) said: "The partnership between CFA Institute and EDHEC Business School brings together a great combination in the world of asset management. Continuing education for investment managers and institutional investors is essential to improving investment strategies and performance. The EDHEC partnership, with its reputation as the foremost research institution in the area, will deliver an exceptional executive education offering."

The next Advances in Asset Allocation Seminar, which is intended for investment management professionals who advise on or participate in the design and implementation of asset allocation policies and portfolio models, will be held 17-19 November at The Dorchester hotel in London. To participate, contact Mélanie Ruiz, EDHEC Asset Management Education: [AMeducation@edhec-risk.com](mailto:AMeducation@edhec-risk.com) or +33 493 187 819.

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**EDHEC****RISK AND ASSET MANAGEMENT RESEARCH CENTRE**

393-400 Promenade des Anglais - BP 3116 - 06202 Nice Cedex 3 - France

Tel. +33 (0)4 93 18 78 24 - Fax +33 (0)4 93 18 78 40

[www.edhec-risk.com](http://www.edhec-risk.com)

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### Media Contacts:

**Steve Wellard** (Europe, Middle East, Africa):  
Tel.: + 44 (20) 7531-0755  
E-mail: [steve.wellard@cfainstitute.org](mailto:steve.wellard@cfainstitute.org)

**Séverine Anjubault:**  
Tel.: +33 (0)4 93 18 78 63  
E-mail: [severine.anjubault@edhec-risk.com](mailto:severine.anjubault@edhec-risk.com)

### Notes to Editors

#### CFA Institute

CFA Institute is the global association for the investment profession. It administers the CFA and CIPM curriculum and exam programs worldwide; publishes research; conducts professional development programs; and sets voluntary, ethics-based professional and performance-reporting standards for the investment industry. CFA Institute has more than 96,500 members, who include the world's nearly 83,000 CFA charterholders, in 134 countries and territories, as well as 136 affiliated professional societies in 57 countries and territories. More information may be found at [www.cfainstitute.org](http://www.cfainstitute.org).

#### About EDHEC

EDHEC Business School, founded in 1906 and among the select few institutions to have garnered international recognition through the triple crown of EQUIS, AACSB and Association of MBAs accreditations, offers management education designed to meet the needs of companies. Its large range of international graduate programmes draws students from the world over. With its three campuses in Lille, Nice, and Paris, its 5,000 students, more than 25% of whom are from abroad, and its 110 full-time faculty, EDHEC has been ranked among the top European business schools for several years.

For the last five years, as part of its strategy for international excellence, EDHEC Business School has espoused an innovative research policy that takes into account the needs of companies and the market. Research at EDHEC is organised into four centres built on the expertise of the faculty.

The aim of the EDHEC Risk and Asset Management Research Centre is to produce research that meets the most stringent academic standards and to facilitate corporate use of this research. In partnership with large financial institutions, the research centre brings together 40 researchers and implements six industry-sponsored programmes focusing on asset allocation and risk management in the traditional and alternative investment universes. The research centre maintains a website devoted to asset management research for the business community, [www.edhec-risk.com](http://www.edhec-risk.com).

EDHEC  
RISK AND ASSET MANAGEMENT RESEARCH CENTRE

393-400 Promenade des Anglais - BP 3116 - 06202 Nice Cedex 3 - France  
Tel. +33 (0)4 93 18 78 24 - Fax +33 (0)4 93 18 78 40  
[www.edhec-risk.com](http://www.edhec-risk.com)