



## WEBINAR - PHOCION GLOBAL PERFORMANCE COMMITTEE

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September 6, 2017





## Phocion Investment Services

- Phocion founded in 2010
- Servicing the largest to the smallest industry participants in all aspects of performance



## Performance Reality and Need

- Scarcity of professionals with extensive performance experience
- Industry-wide misunderstanding of the field of investment performance



## Committee for Performance Peers

- Creation of a global investment performance committee
- Provide a forum for performance professionals to share knowledge in all things performance

## Committee's Purpose

- Find out what our peers are doing in various areas of performance
- Develop ideas and put into place best practices that go beyond GIPS
- Discuss state of performance in the industry and dedicate to enhance its profile
- Networking amongst performance professionals
- Contribute to the promotion and growth of the field of investment performance within the industry



## Greater Voice

- Performance is constantly used and highly marketed
- Advocating for performance have a greater voice – performance professionals are most qualified



## Near-Term Objective

- 2008 reality - the value of qualified risk professionals was recognized
- 2018 objective - get performance to the status it deserves to benefit the industry as a whole



## Interested in Joining the Phocion Global Performance Committee?

Send an email to [info@phocioninvestments.com](mailto:info@phocioninvestments.com) with the following:

- Your name along with link to LinkedIn profile
- Your present role within the field of performance
- How you would like to see the field evolve over the next five years





## Selection Process

- Open to all performance professionals who have dedicated themselves to the field and work to improve it



## Any Questions?



## Management Team -

### **Ioannis Segounis, B.Eng, MBA, CFA, CIPM**

Founder and Managing Director

Industry Experience: Performance and Research

Career began: 1999

Founded: 2010

### **David Rowen, CFA, FRM, CIPM**

Managing Director

Industry Experience: Investment Management and Research

Career began: 1994

Joined team: 2015

### **Kosta Segounis, CPA, CA, CFA**

Managing Director

Industry Experience: Due Diligence and Investment Compliance

Career began: 1995

Joined team: 2015



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