



**CFA Society
Orange County**



2020 ECONOMIC FORECAST DINNER

February 26, 2020

5:00 – 8:00 PM

The Pacific Club
4110 MacArthur Blvd.
Newport Beach, CA 92660

Parking is complimentary.

Members: \$50

Non-Members: \$100

Students, Candidates: \$50

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CFAOC.ORG



JEFF ROSENBERG, CFA

*Managing Director
BlackRock*

In a world where uncertainty continues to grow on the economic outlook for the US and yields across the globe continue to be historically low, Jeff will share his views on the economy and impact for fixed income investors.



BEN MANDEL

*Economist
J.P. Morgan Asset Management*

Ben will present an overview of current macro views and tactical positioning in J.P. Morgan's global multi-asset portfolios, with a focus on which equity markets are preferred in 2020.



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SPEAKERS

JEFFREY ROSENBERG, CFA

Jeffrey Rosenberg, CFA, Managing Director, leads active and factor investments for mutual funds, institutional portfolios and ETFs within BlackRock's Systematic Fixed Income ("SFI") portfolio management team. In this role he serves as a member of the SFI Investment and Executive Committees and as a senior portfolio manager for a number of our investment products including the Systematic Multi-Strategy fund. Mr. Rosenberg's service with the firm dates back to 2011, when he joined the Fundamental fixed income group as Chief Investment Strategist for fixed income. In 2016, this role transitioned into the BlackRock Investment Institute, where he helped develop BlackRock's strategic and tactical views on sector allocation within fixed income, currencies and commodities.



Prior to joining BlackRock, Mr. Rosenberg spent nearly 10 years at Bank of America Merrill Lynch as the Chief Credit Strategist coordinating strategy across all fixed income, securitized assets, credit, FX and commodities. Mr. Rosenberg earned a Master of Science degree in Computational Finance from Carnegie Mellon, a BA in Mathematics from the University of Minnesota, and a BA in Finance from the University of Wisconsin.

BENJAMIN R. MANDEL

Benjamin R. Mandel is an economist in Multi-Asset Solutions at J.P. Morgan Asset Management in New York. As a member of the Global Multi-Asset Strategy team, he formulates tactical asset allocation views based on analysis of the global economy. He is also currently an adjunct professor at Columbia University's School of International and Public Affairs, teaching a class in international trade. Ben's academic research has been published in leading scholarly journals, including: American Economic Review, American Economic Journal: Macroeconomics, American Economic Journal: Economic Policy, Quantitative Finance and the Journal of Economic Perspectives.



Prior to joining J.P. Morgan, Ben was a member of the Global Economics team at Citi Research and, prior to that, an economist in International Research at the Federal Reserve. He holds a Ph.D. in Economics from the University of California, Davis, and a B.Sc. in Applied Economics from Cornell University.