RICHARD F. JOHNSON, CFA

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SUMMARY

Experienced senior portfolio manager focused on delivering outperformance. Strong background in fundamental analysis, macroeconomic research and stock selection models. Managed equity long-only, global macro long-short, global equity market neutral and multi-manager mutual funds. Added value across strategy types and in different market environments. On front end of new initiatives and start-up situations. CFA, MS / MBA, University of Chicago.

EDUCATION

THE UNIVERSITY OF CHICAGO PHYSICAL SCIENCES DIVISION Chicago IL

Master of Science in Analytics, Applied Data Science

- Worked full-time while completing degree: Mesirow Financial (2019-2020) and SFV Analytics LLC (2020-2022)
- Capstone Project: Stock Selection via Deep Learning on AWS (Award: Honorable Mention)

THE UNIVERSITY OF CHICAGO BOOTH SCHOOL OF BUSINESS Chicago IL

Master of Business Administration, Finance and Marketing, Dean's List

- Management Consultant (Internship), ITCA Europe Ltd, Warsaw, Poland
- Advanced Microeconomic Analysis (Prof. Kevin Murphy) and Theory of Financial Decisions-1 (Prof. Eugene Fama)

PACIFIC LUTHERAN UNIVERSITY Tacoma WA

Bachelor of Business Administration, cum laude, Finance, Beta Gamma Sigma Honor Society

- Chapter President, Beta Gamma Sigma, Wall Street Journal Student Achievement Award

EXPERIENCE

RUSSELL INVESTMENTS, Seattle WA 2010 – 2017

Portfolio Manager, U.S. Equity Portfolio Management (June 2014 – February 2017)

Managed Multi-Manager Mutual Funds with $5 Billion AUM including U.S. Defensive and U.S. Quant Funds.

- Changed mandate from long-only to 130/30, allowing shorts outside of benchmark, achieving 3 good years in a row, dramatically improving upside/downside capture ratio, and increasing Morningstar 3-Year rating from 3 to 5 stars.

MENTA CAPITAL, San Francisco CA 2007 – 2008

Portfolio Manager, Global Equity Market Neutral (February 2007 – December 2009)

Launched and continually improved systematic stock selection process for hedge fund strategies with $200 Million AUM.

- Interpreted financial statements within the context of the macroeconomic environment, developed method of systematically overriding alpha on select securities during the Global Financial Crisis achieving a hit rate of over 90%.

CRESCAT PARTNERS, San Francisco CA 2005 – 2007

Portfolio Manager, Crescat Global Macro Fund LP (September 2005 – February 2007)

Launched fund to prove value of macroeconomic research (ranked #1 Macro Fund/rated 5-Stars by Morningstar).

- Implemented long-short hedge fund strategies to exploit economic imbalances in housing and credit markets.
- Independently validated macroeconomic themes with fundamental stock selection model using cross-sectional data.

MCMORGAN & COMPANY, San Francisco CA 2000 – 2004

Portfolio Manager, U.S. Large Capitalization Core Equity (May 2000 – November 2004)

Collaborated with peers conducting equity and macroeconomic research, over 1,000 meetings with CEO/CFOs, analyst meetings, on-site company visits, and earnings calls. Covered industrials, materials, and energy sectors.

- Discovered macroeconomic imbalances in housing and credit markets as a potential driver of returns.

Prior leadership roles managing a team of portfolio managers and analysts at Barclays Global Investors.

ADDITIONAL

- CFA Charterholder: CFA Institute and CFA San Francisco member, Chicago Quantitative Alliance member.
- Finsera, BARRA/Axioma Optimizer/Risk Models, XML, UNIX/Linux, SQL, SAS, MATLAB, Python, Julia and R.