Bozidar Jovanovic, PhD, CFA

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University Professor with Extensive Industry Experience

Over 14 years of hands on teaching experience at college and high school level. Twenty five years of financial industry experience with extensive research in securities valuation, derivatives pricing, portfolio management, time series and trading strategies, risk management, fixed income and equities. Teaching Finance and investment courses for undergraduate and graduate students. Teaching Physics classes at the college level from introductory to advanced.

Education

Certificate in Quantitative Finance (CQF), (02/2009)

CFA Charterholder (09/2003)

Ph.D. in Physics (Modeling Electronic Transport in Low-Temperature Systems) (01/1999)
Boston University, Massachusetts

Diploma (BSc) in Theoretical Physics (07/1992)
Belgrade University, Serbia

Technical Proficiencies: C/C++, VBA, MATLAB, Bloomberg, Zephyr StyleADVISOR, Morningstar

Career Experience

Manhattanville College **2012 – 2014**
Director of the Master of Science in Finance Program in the school of Graduate and Professional Studies. Coordinating courses, supervising thesis work, developing curriculum.

Adjunct Professor, Manhattanville College **2009 – 2017**
Developing and teaching courses in the School of Professional Studies (formerly Graduate and Professional Studies):

1. Quantitative Methods in Finance
2. Investment Theory and Practice
3. Valuation and Portfolio Management
4. Fixed Income Securities
5. Derivatives and Risk Management

Mentored 20+ Masters of Science in Finance theses

Adjunct Professor, SUNY Purchase **2009 – 2012**
Teaching courses to the undergraduate audience – Physics of Sound and Light, Introductory Physics

Visiting Professor of Science, Bard High School Early College **2009 – 2009**
Teaching high school (algebra based) and college level (calculus based) physics courses.

Chief Investment Officer, Honey Badger Advisors LLC, Rye NY **2021 – Present**
Establish and maintain an independent, fiduciary, and fee-only RIA to deliver services to mass affluent and high-net-worth investors. Identify clients' needs and provide solutions with high-touch, white-glove service. Create evaluation and selection process for outside fund managers and build core portfolios for corresponding risk appetites. Manage custom portfolios in accordance with IPS.

- Developed and implemented investment processes, designed presentations, and deployed prospecting systems.

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- Developed satellite portfolios to enhance core portfolio returns and take advantage of market opportunities.
- Established and maintained open communication with clients in order to keep them appraised of economic developments and their portfolio performance.

Chief Portfolio Strategist, First Vice President, Leumi Investment Services, Inc., New York, NY **2014 – 2020**

Developed discretionary multi-asset portfolios with a keen focus on enabling the private bank to offer investment options in four risk categories and two thematic portfolios. Navigated, reviewed, and assessed portfolios of HNW and institutional clients, including endowments and foundations. Delivered strategic recommendations to ensure asset allocations based on risk profiles, time horizons and needs. Built and lead due diligence efforts and ensured ongoing performance monitoring to establish rankings (across styles and categories) for outside investment managers, SMA advisors, and alternative asset managers. Supported executive decision-making while serving as co-chair of the investment committee.

- Selected by the head of private banking to devise and deploy entire strategy function from a clean slate.
- Facilitated in development of an investment advisory platform and delivered effective asset allocation suggestions to bankers for smooth implementation which resulted in growing business to $125MM AUM in two years.
- Built a team of cross-functional staff from the ground up and supported the asset allocation committee for the banks own pension fund.

Executive Director, Desk Strategist Team Manager, Morgan Stanley Smith Barney, Purchase, NY **2010- 2011**

Mentored and led a team of eight quantitative analysts to develop and implement valuation models for various securities and lending products offered by the bank. Built a comprehensive model for the capital markets, private bank, and wealth management divisions as head desk strategist.

- Improved product model coverage from 30% to 70% within nine months period with a keen focus on expanding risk calculation, mitigating bank's risk exposure, and navigating through the OCC examination.
- Models included fixed income, structured products, bank deposits, asset based loans, mortgage rate locks, derivatives
- Built and trained a team of eight people in three months to get all the modeling done for the December examination.

Analyst / Programmer, Bloomberg LP, New York, NY **1998- 2002**

Quantitative analysis and implementation of multiple calculators for financial instruments, derivatives and portfolio management.

Graduate Studies, Boston University, Boston, MA **1992- 1999**

- Analyzed statistical properties of avalanches in a model of a complex dynamical system that exhibits self-organization, whose components interact through short – range interaction.
- Analyzed properties of the distributions of conductance and of transmission probabilities in mesoscopic semiconductor systems exhibiting Quantum Hall Effect. Discovered a new numerical method for conductance computation, which enabled a theoretical understanding of fluctuations of conductance in these complex systems.

Certification & Licensure

Chartered Financial Analyst (CFA) – CFA Institute

Certificate in Quantitative Finance (CQF) – Fitch Learning

FINRA Series 7 and 66 ▪ Life, Accident, Health Insurance (New York and Florida)

Memberships

CFA Institute, CQF Alumni, American Physical Society