

# AMY LUBAS, CFA

## Advisory Strategist

**Amy Lubas, CFA**, is the Advisory Strategist for Ned Davis Research Group. She is a member of the Research Applications team, working alongside NDR's ETF Strategist, Tony Welch, to provide strategy and implementation ideas for investment advisors.

Amy has been working in the investment industry since 1996, with both buy-side and sell-side experience. She joined the firm in July 2004 as an analyst on the sector team. She has been a sector generalist and a specialist, most recently serving as NDR's Technology & Industrials Strategist. She developed strategy commentary in the *U.S. Sector Strategy | Capex Corner* publications for the Capex, Innovation & Productivity, and Transports themes, and provided industry recommendations within the Technology and Industrials sectors. She was also a contributor to the *U.S. Sector Strategy | Sector Allocation* and quarterly *U.S. Strategy | Benchmarks* publications. From 2004 to 2011, she helped to quantitatively manage an equity pension portfolio using NDRG's ranking systems and risk control techniques.

Prior to NDRG, Amy worked as a Senior Equity Research Analyst at State Street Research & Management in Boston, MA, where she provided investment recommendations on stocks within the technology sector to portfolio managers, and helped manage the firm's Analyst Fund. Amy also worked in the Boston office of SG Cowen Securities Corporation as an Institutional Research Analyst, where she published equity research on the electronics manufacturing services industry for portfolio managers and analysts.

Over the course of her career, Amy's commentary has been featured in *The Wall Street Journal*, *Barron's*, *SmartMoney*, *Silicon Investor*, and other financial and technology publications.

Amy is a CFA charterholder and is an active member of CFA Tampa Bay. She is a cum laude graduate in Finance from Boston College, and earned her Master in Business Administration in Finance from Vanderbilt University (Owen).



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