



Lisa Michalski, CFA

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Lisa Michalski, CFA, Associate Director, Custom Research Solutions, leads a team of analysts who perform quantitative analysis, including portfolio evaluation, equity selection, and asset allocation modeling. Lisa designs and maintains models, including NDR's flagship Global Balanced Account Model and Global Regional Equity Model. Lisa joined the firm in 2007.

Lisa is a lead model developer and manages several portfolio strategies in NDR's Investment Solutions ("NDRIS") division. NDRIS leverages NDR's market research, data, and quantitative modeling expertise to power ETFs, SMAs, UITs, and mutual funds. Lisa is also a member of NDR's Index Committee, performing model evaluation and approving new models as well as enhancement to existing models.

Before joining NDR, Lisa was a Vice President in Credit Risk Technology for Goldman Sachs Group, Inc., where she was responsible for quantitative risk measures of derivative portfolios.

Lisa earned a Master of Science degree in Computational Finance from the Tepper School of Business, Carnegie Mellon University. She received her Bachelor of Science degree in Computer Science from the University of Michigan. Lisa is a CFA charterholder and is a member of the CFA Institute and CFA Tampa Bay. Lisa is also a volunteer member of the State College of Florida Foundation's (SCFF) Asset Management Committee.



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