

# Samuel Kunz

Studies  
Notes

List

	Subject	Title	Sources	Date
1.	130/30 Strategies	Overview	Notes - Requested by [Withheld]	2008/05/23
2.	Allocation	The Importance of Asset Allocation	Financial Analyst Journal   Roger G. Ibbotson	2010/05/07
3.	Allocation (Alternative)	Public and corporate pension funds: The Same But Different	All About Alpha	2010/10/04
4.	Allocation (Alternative)	Institutional Investor Survey - Fall 2010	Bank of America Merrill Lynch	2010/12/17
5.	Allocation (Alternative)	Investors: So long, "Traditional" Investments	All About Alpha	2011/02/04
6.	Allocation (Diversification)	Horizon Diversification: reducing Risk in a Portfolio of Active Strategies	Barclays Capital: Quantative Portfolio Strategy	2011/03/29
7.	Allocation (Managers)	Selection and Termination of Investment Management Firms	The Journal of Finance - August 2008   A. Goyal and S. Wahal	2008/09/02
8.	Allocation (Managers)	Strategic Allocation vs. Managers Selection   Traditional/Alternative	Journal of Alternative Investments  Reddy et al.	2010/03/22
9.	Allocation (Managers)	When is Alpha Not Really "Alpha?" When it's "Beta-Alpha"	Eric Petroff, Curtis Yasutake   Wurts & Associates	2010/05/20
10.	Allocation (Rebalancing)	Analysis of Investment Allocation Decisions by Institutional Investors	S. Stewart, J. Neumann, Ch. Knittel, and J. Heisler	2010/08/10
11.	Allocation (Risk Parity)	Risk Parity	First Quadrant, GMO, Maketa, NEPC, P&I	2010/09/03
12.	Allocation (Tactical)	Should Institutional Investment Policy Be More Dynamic?	Goldman Sachs   Strategic Research - September 2009	2009/09/09
13.	Behavioral	See For Yourself: The Importance of Checking Claims	Legg Mason   Mauboussin on Strategy: See For Yourself	2009/12/03
14.	Behavioral (Committees)	Investment Committees	Legg Mason   Mauboussin on Strategy: Investment Committees	2009/09/08
15.	Behavioral (Committees)	Improving the Effectiveness of Investment Committees	Vanguard Institutional Asset Management	2010/04/07
16.	Behavioral (Committees)	Investment Governance: A Pragmatic Update	Russell Investments	2010/12/10
17.	Behaviorial (Committee)	Public pension funds in a dangerous race with one another	All About Alpha	2011/03/24
18.	Benchmarks and Attribution Analysis	Overview	CFA Institute (Various)	2008/08/28
19.	Benchmarks and Attribution Analysis	Equity Performance Benchmarks	Comments on Sandy River Benchmark Analysis for Dow Jones	2009/07/13
20.	Benchmarks and Attribution Analysis	Fundamental Indexation	R. Kaplan, R. Ennis, A. Perod (Various)	2009/07/13
21.	Commodities	Can Alternative Assets Continue to Satisfy Diversification Cravings?	CFA Institute Magazine	2009/03/23
22.	Currencies	Introduction	CFA Institute (Various)	2008/06/17
23.	Currencies	What is the Point? Demystifying the Currencies Arena	Clontarf Capital	2008/12/01
24.	Distressed Investing	Private Advisor	White Paper (10/08)	2008/11/03
25.	Distressed Investing	Hedge Funds Review and Outlook	Investcorp Hedge Funds (October 2008)	2008/11/12
26.	Distressed Investing	Credit Opportunities	Clontarf - Playing the Credit Card (November 2008)	2008/12/22
27.	Distressed Investing	Event-driven investments in Senior Secured Loans	Clontarf - Playing the Credit Card (November 2008)	2008/12/22
28.	Enhanced Indexing	Separate Category or Marketing Niche?	Notes (Various)	2008/07/22
29.	Equity	Scouring the Globe for Alpha: The Logic Behind Global Equity Investing	JPMorgan   Insights	2009/12/11
30.	Equity	Emerging Markets - an outdated concept?	EDHEC-Risk Institute	2010/12/06
31.	Fund of Hedge Funds	How to Select a Hedge Fund of Funds	Alan H. Dorsey, CFA	2008/06/23
32.	Fund of Hedge Funds	A Hard Way to Make an Easy Living	All About Alpha	2011/07/15
33.	Global Macro	The Changing Nature and Rold of Tacital Asset Allocation	First Quadrant	2009/03/24
34.	Global Macro	Systematic Global Macro	Grham Capital, CFA institute, RaisePartners	2009/06/30
35.	GSEs	Understanding the Rescue Plan for Freddie Mac and Fannie Mae	Morgan Stanley: MarketPulse	2008/09/12
36.	Hedge Funds	Managed Accounts: The New Normal?	Barclays Capital: Capital Solutions	2011/08/02

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Notes

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37.	Infrastructure	The Opportunity in Global Infrastructure	Invesco Private Capital	2008/08/15
38.	Infrastructure	Infrastructure as an Investment Class	HSBC	2008/09/30
39.	Infrastructure	PEIMedia Infrastructure Investor Conference - New York	Notes	2008/10/24
40.	MWDBE	Progress Investment Management	Successful Emerging Manager Strategies	2008/12/15
41.	MWDBE	Progress Investment Management	Evolution of the Term "Emerging Manager"	2008/12/15
42.	MWDBE	Affirmative Investing: Women and Minority Owned Hedge Funds	BarclaysCapital: Capital Solutions	2011/06/10
43.	MWDBE	Emerging Managers: Good Buy or Boob Bye?	BarclaysCapital: Capital Solutions	2011/06/10
44.	Performance	S&P Indices Versus Active Funds Scorecard: Mid-Year 2010	S. Dash	2010/08/31
45.	Performance	Some Like it Hot	MSCI, All About Alpha	2011/02/25
46.	Performance	S&P Indices Versus Active Funds Scorecard: Year-End 2010	S. Dash	2011/03/24
47.	Private Equity	Buyout Performance	Calder Capital Partners & Permal Group	2008/07/15
48.	Private Equity	Small- and Middle-Market Segments	Calder Capital Partners	2008/07/15
49.	Private Equity	Impact of FAS 157	BlackRock	2008/10/14
50.	Real Estate	Property Types in Perspective	Emerging Trends in Real Estate 2009	2008/11/04
51.	Securities Lending	Securities Lending Update	The Northern Trust	2008/09/26
52.	Small/Mid Cap Investing	Perspectives: Thinking Outside the Small Cap Box	Goldman Sachs	2008/10/27
53.	Special Report	Anatomy of a Crisis	Goldman Sachs	2008/10/10
54.	Special Report	Public Fund CIO Survey	Morgan Stanley (November 2008)	2008/11/12
55.	Special Report	Perspectives	What to do Next?	2008/10/30
56.	Special Report	A Long-Term Perspective on Stocks and Bonds	Wellington Management	2010/11/24
57.	Special Situations	Investments in Timber (UIM)	Notes - Requested by [Withheld]	2008/05/23
58.	Special Situations	KBC Eco Fund Water	Notes - Requested by [Withheld]	2008/05/23
59.	Special Situations	Special Situations & Timber	When Markets Collide   M. El-Erian	2008/08/15
60.	Structured Products	Acronyms, CMOs vs. CDOs, Plan's Exposure	Notes - Requested by [Withheld]	2008/09/16
61.	Structured Products	Plan's Exposure to Structured Products in its Fixed Income	Notes - Requested by [Withheld]	2008/10/30