

Naveen Malwal, CFA

Institutional Portfolio Manager
Fidelity Investments

Naveen Malwal is an institutional portfolio manager in the Strategic Advisers division at Fidelity Investments. Strategic Advisers LLC is a registered investment adviser and a Fidelity Investments company. Fidelity Investments is a leading provider of investment management, retirement planning, portfolio guidance, brokerage, benefits outsourcing, and other financial products and services to institutions, financial intermediaries, and individuals.

In this role, Naveen is responsible for delivering Strategic Advisers' managed account investment philosophy, process, and ongoing activities to a wide range of investors. He is a member of the investment management team at Strategic Advisers.

Prior to assuming his current role, Naveen served as a portfolio strategist in the Portfolio Research and Consulting group at Natixis Global Asset Management. In this capacity, he was responsible for counseling financial advisors on portfolio construction and asset allocation. Previously, Naveen was an investment strategist in the U.S. Equity Research group at State Street Global Markets and a financial analyst at State Street Corporation. Naveen joined Fidelity in 2014 and has been in the financial industry since 1998.

Naveen earned his Bachelor of Arts from Tufts University and his Master of Business Administration from New York University's Stern School of Business.

Professional Designations:

Chartered Financial Analyst (CFA), FINRA Series 7 License, FINRA Series 63 License

The Chartered Financial Analyst (CFA) designation is offered by the CFA Institute. To obtain the CFA charter, candidates must pass three exams demonstrating their competence, integrity, and extensive knowledge in accounting, ethical and professional standards, economics, portfolio management, and security analysis, and must also have at least 4,000 hours of qualifying work experience completed in a minimum of 36 months, among other requirements. CFA® is a trademark owned by CFA Institute.

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