

## Mitch Livstone, PhD, CFA

Chief Investment Officer, Multi-Asset Systematic Strategies  
Fidelity Investments

Mitch Livstone is a chief investment officer for Multi-Asset Systematic Strategies in the Quantitative Research and Investments division at Fidelity Investments. 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. QRI supports our investors with timely and actionable insights, manages systematic products and solutions, and enables scale through adoption of common platforms.

In this role, Mitch is responsible for leading the team responsible for the research and management of systematic multi-asset liquid alts strategies.

Prior to assuming his current role, Mitch was the CIO of Fidelity's Arbitrage and Hedging Solutions group, where he led a team that developed and ran alternatives investment vehicles, focusing primarily on relative value arbitrage strategies and defensive hedging solutions. Mitch began his career in Fidelity's Fixed Income division, as a quantitative analyst and then a portfolio manager. Later, he worked as a portfolio manager at Harvard Management and Geode Capital Management, where he also led the arbitrage team. Additionally, before rejoining Fidelity, Mitch served as the CIO and a portfolio manager of a biotechnology-focused hedge fund. Mitch joined Fidelity in 2012.

Mitch earned his Bachelor of Science and Master of Science from Case Western Reserve University and his PhD from Massachusetts Institute of Technology (MIT).

### **Professional Designations:**

Chartered Financial Analyst (CFA)

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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