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FIXED INCOME ANALYSTS SOCIETY, INC.

25th Annual Hall of Fame
Induction Ceremony & Dinner

September 26, 2023
Union League Club, New York City

Hall of Fame



Inductees:

Steven Berkley
*Former Chief Executive Officer
Bloomberg Index Services Limited*

Robert Michele, CFA
*CIO & Head of Global Fixed Income, Currency & Commodities
J.P. Morgan Asset Management*

Barbara Novick
*Co-Founder and Former Vice Chair
BlackRock*



DBRS Morningstar would like to congratulate

Steven Berkley
Robert Michele
Barbara Novick

and join FIASI in celebrating their induction at the 25th Annual Hall of Fame Ceremony and Dinner for their contributions to the advancement of fixed income security and portfolio analysis.



BNP Paribas congratulates the

Fixed Income Analysts Society 2023 Hall of Fame Inductees:

Steven Berkeley, *Former Chief Executive Officer, Bloomberg Index Services Limited*

Robert Michele, *CIO & Head of Global Fixed Income, Currency & Commodities, J.P. Morgan Asset Management*

Barbara Novick, *Co-Founder and Former Vice Chair, BlackRock*



BNP PARIBAS

The bank for a changing world

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FIXED INCOME ANALYSTS SOCIETY, INC.

HALL OF FAME

In 1995, the Fixed Income Analysts Society established a Hall of Fame to recognize the lifetime achievements of outstanding practitioners in the advancement of the analysis of fixed income securities and portfolios. Inductees will have made major contributions to the advancement of fixed-income analysis and portfolio management. These contributions may be academic, business related or FIASI-related. The Board of Directors determines the annual inductees.

Martin L. Leibowitz, Ph.D. was selected as the first inductee for his work facilitating the development of mortgage- backed securities, fixed income indices, zero coupon bonds, portfolio dedication and immunization and bond portfolio measurement tools. Since then, FIASI has honored 55 additional professionals as inductees of FIASI's Hall of Fame.

FIXED INCOME HALL OF FAME INDUCTEES

2023

Steven Barkley
Robert Michele, CFA
Barbara Novick

2019

William F. Sharpe, Ph.D.
Roger W. Ferguson, Jr.
Daniel J. Ivascyn

2018

John "Mac" McQuown
Mary J. Miller
Mark R. Shenkman

2017

Dana M. Emery
Jeffrey E. Gundlach

2016

Edward C. "Ned" Johnson 3rd
Howard Marks

2015

Michael R. Bloomberg

2014

Curtis Arledge
Joyce Chang
Harry Markowitz, Ph. D.

2013

Jim Grant
Rick Rieder

2012

Bob Auwaerter
Lim Chow Kiat
Glenn Reynolds

2011

Mohamed A. El-Erian, Ph.D.
John D. Finnerty, Ph.D.

2010

Kitty Yoh
Bob Litterman
Bob Levine

2009

Keith Anderson
Laurie Goodman
Jonathan Hull, Ph.D.

2007

Margaret Cannella
S. Kenneth Leech
Robert C. Merton, Ph.D.

2006

Angelo Mozilo

2005

Laurence Fink

2004

Patricia L. Cook
Robert A. Jarrow, Ph.D.
Dexter Senft

2003

Jack V. Malvey, CFA
Leo C. O'Neill

2002

Frank J. Fabozzi, Ph.D., CFA, CPA
Abner Goldstine
Oldrich A. Vasicek, Ph.D.

2001

Edward I. Altman, Ph.D.
Lewis S. Ranieri
Eunice Reich-Berman, CFA

2000

Martin S. Fridson, CFA
Daniel J. Fuss, CFA, CIC
Harold H. Goldberg

1999

John C. Bogle
Richard S. Wilson

1998

H. Russell Fraser
Wayne D. Lisky

1997

Andrew J. Kalotay, Ph.D.
Henry Kaufman, Ph.D.
Sidney Homer

1996

Fischer Black, Ph.D.
William H. Gross

1995

Martin L. Leibowitz, Ph.D.

Hall of Fame



Congratulations to FIASI's 2023 Hall of Fame honorees Barbara Novick, Robert Michele, and Steven Berkley.

We are honored and delighted to celebrate your lifetime contributions to our industry. Fitch is proud to be a longtime Sustaining Member of FIASI and support its programs for the benefit of the fixed income community.

www.fitchratings.com



Inspired by your leadership

Barclays congratulates the 2023 Hall of Fame inductees for their commitment to FIASI and the fixed income community.



FIXED INCOME ANALYSTS SOCIETY, INC.



STEVEN BERKLEY

*Former Chief Executive Officer
Bloomberg Index Services Limited*

Steven Berkley is a financial professional with 40 years of experience. He joined Bloomberg as the global head of its index business in 2014. He was responsible for Bloomberg's index development, production processes, governance activities and index client relationships.

In 2018, Berkley was named Chief Executive Officer for Bloomberg Index Services Ltd (BISL). Berkley oversaw Bloomberg Indices' use of data, pricing, analytics, distribution and research required by market participants including asset managers and owners, pension consultants and sell-side firms. His team enhanced Bloomberg's index procedures to ensure compliance with evolving regulatory requirements.

He was part of the team that negotiated Bloomberg's acquisition of Barclays Risk Analytics and Index Solutions Ltd. (BRAIS) in 2016. The purchase included the Barclays Fixed Income benchmark indices, BRAIS strategy indices and the intellectual property of the POINT portfolio analytics platform. These indices, widely used since 1973, are considered the industry standard for fixed income investors. Under Berkley's leadership, Bloomberg Indices has quickly expanded beyond its flagship fixed income offering to include benchmarks for equities, commodities, ESG, multi-asset and thematic strategies, as well as index-linked products such as the Bloomberg Short Term Bank Yield Index (BSBY) and Bloomberg's Tradable Trackers. Total assets tracking Bloomberg's indices total in the trillions of dollars.

Prior to Bloomberg, Berkley headed the relationship management function for BlackRock Solutions and served as Chief Operating Officer for the Aladdin business. Most of his career was spent as the Global Head of the index business at Lehman Brothers where he helped launch the U.S. Aggregate Index, created the Global and Euro-Aggregate Indices, conducted Index Advisory Councils and worked closely with clients worldwide. He was voted the winner of Institutional Investor's Index Award from its inception in 1997 until his departure from Lehman in 2005.

Berkley is a member and past president of the Fixed Income Analysts Society (FIASI). He holds a BS in Computer Science and an MBA, both from Hofstra University, where he was inducted into Phi Beta Kappa.

Hall
of Fame

Congratulations to this year's Hall of Fame inductees

We salute your incredible leadership,
distinguished service and enduring
dedication to excellence in the fixed
income industry.



Bob Michele, CFA

*CIO & Head of Global Fixed Income,
Currency & Commodities
J.P. Morgan Asset Management*

J.P.Morgan
ASSET MANAGEMENT

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FIXED INCOME ANALYSTS SOCIETY, INC.



ROBERT MICHELE, CFA

*CIO & Head of Global Fixed Income, Currency & Commodities
J.P. Morgan Asset Management*

Bob Michele, Managing Director, is the Chief Investment Officer and Head of the Global Fixed Income, Currency & Commodities (GFICC) group. Prior to joining the firm in 2008, Bob was at Schroder Investment Management for ten years, most recently serving as the global head of fixed income in London. Previously, Bob was a managing director at BlackRock from 1995 to 1998, responsible for managing core bond portfolios and developing credit strategies across all client mandates. Prior to that, Bob was at FirstBoston Asset Management as head of their US fixed income business and Brown Brothers Harriman managing taxable, total return portfolios for non-U.S. institutions. Bob began his career at Bankers Trust, working as an investment analyst and portfolio manager. He holds a B.A. in classics from the University of Pennsylvania, is a CFA® Charterholder and has the Investment Management Certificate of the UK Society of Investment Professionals.

BANK OF AMERICA 

Bank of America is proud to support Fixed Income Analyst Society's Hall of Fame. Congratulations to Barbara Novick, Bob Michele and Steve Berkley on your well-deserved recognition.

Bank of America, N.A., Member FDIC.

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Hall
of Fame

intel.

Congratulations to Intel Board Member **Barbara G. Novick**

Intel congratulates Barbara G. Novick for being named to the 2023 Fixed Income Analysts Society Hall of Fame.



Barbara's leadership and contributions to asset management, her dedication to fostering women in finance, and to making a positive difference for the fixed income community are an inspiration.

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FIXED INCOME ANALYSTS SOCIETY, INC.



BARBARA NOVICK

Co-Founder and Former Vice Chair, BlackRock

Barbara G. Novick was a co-founder of BlackRock; Ms. Novick transitioned from Vice Chairman to Senior Advisor as of February 2021.

From the inception of BlackRock in 1988 to 2008, Ms. Novick headed the Global Client Group and oversaw global business development, marketing and client service across equity, fixed income, liquidity, alternative investment and real estate products for institutional and individual investors and their intermediaries worldwide. In 2009, Ms. Novick established BlackRock's Global Public Policy Group to provide a voice for investors; from 2018 to 2020, she additionally oversaw BlackRock's Investment Stewardship team.

Ms. Novick serves on the boards of Intel, New York Life Insurance Company and the American Financial Exchange and on the Growth Curve Capital Advisory Board. In addition, Ms. Novick serves on the boards of Peterson Institute for International Economics, 100 Women in Finance, and the advisory boards of Center for Financial Stability, Millstein Center for Global Markets and Corporate Ownership, and Committee on Capital Markets Regulation. Ms. Novick previously served on the board of Cornell University (2012 - 2020) and served as both Treasurer and Trustee of Westchester Jewish Center (1994 - 2012) and coached in the Westchester Youth Soccer League (1999 - 2015).

ICI congratulates this year's
FIASI Hall of Fame inductees, including
former ICI Board of Governors Member
Barbara Novick.

Thank you for your many contributions
on behalf of investors.



Hall
of Fame

THANK YOU

for your support of the Fixed Income Analysts Society, Inc. Hall of Fame Ceremony.

*Barclays
BlackRock
Bloomberg
BNP Paribas
BofA Securities, Inc.
Center for Financial Stability
Citi
CreditSights
Deutsche Bank Securities Inc.
Fitch Ratings*

*Goldman Sachs
Intel Corporation
Investment Company Institute
J.P. Morgan
Morgan Stanley
Morningstar | DBRS
New York Life Insurance Company
S&P Global
Willkie Farr & Gallagher LLP*



New York Life congratulates our board member, Barbara Novick, and all of the FIASI 2023 Hall of Fame honorees:

Steven Berkley

Former Chief Executive Officer

Bloomberg Index Services Limited

Robert Michele, CFA

CIO & Head of Global Fixed Income, Currency & Commodities

J.P. Morgan Asset Management

Barbara Novick

Co-Founder and Former Vice Chair

BlackRock

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FIXED INCOME ANALYSTS SOCIETY, INC.

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MOODY'S

MORNINGSTAR | DBRS

MSCI 

S&P Global
Ratings

Bloomberg

CreditSights | Know More.
Risk Better.

SUSTAINING MEMBER BENEFITS

- » Partnering with FIASI provides companies a range of tangible business benefits while helping us accomplish our goal of providing thoughtful multi-disciplinary forums for the investment community.

BRAND BUILDING, MARKETPLACE LEADERSHIP AND RISK MANAGEMENT

- » Institutional branding and profile building via FIASI's website, Hall of Fame dinner and other activities targeted directly with fixed income market participants
- » Opportunities to present firm views at well attended Speaker Series events raise awareness of firms' employees and products across the fixed income community
- » Direct connectivity to many of the leading innovators in the fixed income arena
- » Access to FIASI members, event speakers and related content provides independent, third party perspectives that can challenge or validate critical in-house views related to asset allocation and risk management
- » Representation on the Board of Directors, if approved, provides the ability to influence the future direction of the organization

If you are interested in being a sustaining member or for inquires on individual membership, please contact Lauren Nauser for more information.

Hall
of Fame

UPCOMING EVENTS

MUNICIPAL MARKET OPPORTUNITIES & OUTLOOK

November, 2023

GUEST LECTURE AND HOLIDAY GATHERING

December, 2023

WOMEN IN FIXED INCOME

February 7, 2024

Conference to be held at the Federal Reserve Bank of New York

Please see www.fiasi.org for our continually updated schedule.

RECENT EVENTS

INNOVATIONS IN SUSTAINABLE FINANCE

September 18, 2023

Hosted by the Fixed Income Analysts Society (FIASI) together with the Fordham University Gabelli School of Business, the event included a keynote address, followed by a series of case-study type discussions that drill down on innovative capital raising environment-directed financial structures, audience Q&A as well as a networking opportunity.

SUSTAINABLE FINANCE IN FIXED INCOME - RISKS AND OPPORTUNITIES IN 2023

April 20, 2023

Full day Conference with Keynote address and 4 panels discussing these topics:

- The Economic and Investment Impacts of the 2022 Inflation Reduction Act.
- Sustainable Finance Issuance in 2023: Will it pass the \$1 trillion level?
- Update on critical new European Union Sustainability Regulations
- Winners of the Third Annual FIASI-Fordham ESG Research Competition were announced and invited to present their papers on May 17.

BLOOMBERG INTELLIGENCE PANEL DISCUSSIONS

March 29, 2023

Panel 1: Banking Turmoil and Ripple Effects Across Financials

Panel 2: Drivers of Consumer behavior and the impact on the Consumer & Industrial Sectors



Panel 3: Important Capital allocation decisions related to the Energy Sector

Panel 4: TMT Sector relative value update, showcasing Bloomberg's latest data and functionality

WOMEN IN FIXED INCOME

February 9, 2023

Conference included a Keynote address by the Director of Financial Stability Policy Research from the Federal Reserve Bank of New York and two panel discussions.

Panel 1: Macro Outlook: The Economy, Rising Inflation and Rates and Strategies for a Volatile Cycle.

Panel 2: Market Outlook: Is 2023 a Comeback Year for Fixed Income Markets.

With a special presentation made by Girls Inc, National.

PRESIDENT & CEO OF NY FED PRESENTS TO FIASI

January 19, 2023

John C. Williams President and CEO of the Federal Reserve Bank of New York gave his views on monetary policy and the U.S. economic outlook.

To watch these and other videos you must be a FIASI member in good standing.

BOARD OF DIRECTORS

PRESIDENT

Monica Aggarwal, CFA
Fitch Ratings

VICE PRESIDENT

Mark Howard, CFA
BNP Paribas

MEMBERS-AT-LARGE

Jessica G. Broughton | BNP Paribas

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Ralph A. DeCesare, CFA, CAIA
TDAM USA

Gregg Lemos-Stein, CFA
S&P Global Ratings

SECRETARY

Erin Lyons
CreditSights

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Pawel Mosakowski
Summit Place Advisers

Henry Shilling

Sustainable Research and Analysis

Robert Slowko | GRESB

Diane Vazza | Private Equity and FinTech

Mariarosa Verde

Moody's Investors Services

ADMINISTRATION

Lauren A. Nauser, Executive Director

Debra Nanus, Administrative Assistant

Brian P. Shaughnessy, Creative Director
& Website Coordinator

Hall of Fame



CENTER FOR FINANCIAL STABILITY

Congratulations to

BARBARA NOVICK

*Co-Founder and Former Vice Chair at BlackRock
Advisory Board Member at the Center for Financial
Stability*

STEVEN BERKLEY

*Former Chief Executive Officer at Bloomberg Index
Services Limited*

ROBERT MICHELE, CFA

*CIO & Head of Global Fixed Income, Currency &
Commodities, J.P. Morgan Asset Management*

For their induction into the Fixed Income
Analysts Society Hall of Fame and their
respective contributions to fixed income
investing and analysis.

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FIXED INCOME ANALYSTS SOCIETY, INC.

ABOUT FIASI

The Fixed Income Analysts Society, founded in 1975, is a not-for-profit professional organization dedicated to the education of its membership and the fixed income community at large. FIASI serves its members by sponsoring educational programs and workshops covering topics of current interest and presented by distinguished industry leaders. The organization also provides valuable networking and mentoring benefits for its members as well as students aspiring to careers in fixed income. At its annual Hall of Fame induction ceremony, FIASI celebrates the lifetime achievements of Fixed Income industry visionaries.

INDIVIDUAL MEMBER BENEFITS

The Fixed Income Analysts Society is comprised of professionals who value the opportunity to learn, network and discuss important investment topics with colleagues across the industry. We draw from all disciplines – buy-side, sell-side, intermediaries, quants and academics – and all sectors – credit, rates, securitized products, foreign exchange, emerging markets, municipal finance and commodities. Seasoned professionals as well as those new to the industry will reap the benefits of FIASI membership.

- » FIASI sponsors frequent, high quality Educational Programs and Workshops covering topics of current interest to research analysts, portfolio managers and other fixed income professionals. Attendance is free for members.
- » Exclusive networking opportunities are available with other fixed income market participants during cocktail receptions prior to all programs. These events provide a more informal setting to share information, build relationships and expand your professional network.
- » Join your colleagues and industry luminaries at FIASI's Annual Hall of Fame Dinner and Induction Ceremony — FIASI's premier event where leaders in the industry honor lifetime achievements of outstanding fixed income practitioners. Members receive a substantial discount on individual tickets.
- » Members have the opportunity to participate as an Expert Speaker at a FIASI-sponsored event.
- » Members can actively participate in one of FIASI's committees such as marketing, programing, and membership.
- » FIASI's Annual Meeting in June — a favorite event of FIASI's founding members — offers the opportunity to celebrate the accomplishments of its various committees to drive the organization's vision, elect and welcome the new Board and get acquainted with fellow members.

If you are interested in being a sustaining member or for inquires on individual membership, please contact Lauren Nauser for more information.

Hall of Fame

Willkie Farr & Gallagher LLP and
J. Christopher Giancarlo, Senior Counsel and former CFTC Chairman
proudly salute

Barbara Novick

Co-Founder and Former Vice Chair
BlackRock

on her well-deserved induction to the

Fixed Income Analysts Society 2023 Hall of Fame

and congratulates all of
this year's distinguished honorees

*FIASI'S 25th Annual
Hall of Fame Induction Ceremony & Dinner*

WILLKIE
WILLKIE FARR & GALLAGHER LLP

Brussels Chicago Frankfurt Houston London
Los Angeles Milan New York Palo Alto Paris
Rome San Francisco Washington

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FIXED INCOME ANALYSTS SOCIETY, INC.

Goldman Sachs proudly congratulates

Mr. Steven Berkley

Former Chief Executive Officer, Bloomberg Index Services Limited

Mr. Robert Michele

CIO & Head of Global Fixed Income, Currency & Commodities,
J.P. Morgan Asset Management

Ms. Barbara Novick

Co-Founder and Former Vice Chair, Blackrock

**Goldman
Sachs**

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Bloomberg is proud to congratulate Steve Berkley, former CEO of Bloomberg Index Services, Ltd on his induction to the FIASI Hall of Fame as well as to the other distinguished 2023 inductees.

Thank you for your multi-decade contribution to the evolution of the fixed income markets and for your dedication to the advancements of fixed income indices.

**Bloomberg
Indices**

**Hall
of Fame**

FIASI PAST PRESIDENTS

2019-2021	Larry White	1995-1996	Mark R. Girolamo
2017-2019	Robert Slowko	1994-1995	Mary Anne Sudol
2015-2017	Henry Shilling	1993-1994	Clifford M. Griep
2014-2015	Mark Howard, CFA	1992-1993	Caroline J. Smith
2012-2014	Ralph A. DeCesare, CFA, CAIA	1991-1992	John D. Finnerty, PhD.
2011-2012	Mark Howard, CFA	1990-1991	Loretta J. Neuhaus
2009-2011	David W. Munves, CFA	1989-1990	Roy Weinberger, CFA
2008-2009	Alex Golbin, CFA	1988-1989	Andrew J. Kalotay
2007-2008	Mariarosa Verde	1987-1988	Robert Levine, CFA
2006-2007	John D. Finnerty, PhD.	1986-1987	Penelope O. Adelman
2005-2006	Steven D. Berkley	1984-1986	Martin S. Fridson, CFA
2004-2005	Diane Vazza	1983-1984	Robert Angevine
2003-2004	Sean C. Keenan, PhD.	1982-1983	Michael K. Dahood, CFA
2002-2003	John H. Dolan	1981-1982	Alfred G. Mazzorana
2001-2002	Nancy Stroker, CFA	1980-1981	Betty Buckley
1999-2001	Joseph B. Sindelar, Jr., CFA	1979-1980	B. Daniel Evans, Jr.
1998-1999	Lawrence W.D. Taylor, CFA	1978-1979	H. Russell Fraser
1997-1998	Margaret M. Cannella	1977-1978	Richard S. Wilson
1996-1997	Jack Malvey, CFA	1976-1977	H. Russell Fraser

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CREDITSIGHTS IS PROUD TO SUPPORT THE

2023 FIASI Hall of Fame Honorees

Congratulations to the inductees for recognition of your impact on the fixed income markets.

Barbara Novick
Robert Michele
Steven Berkley

CreditSights
a FitchSolutions Company

Research
CovenantReview
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FIXED INCOME ANALYSTS SOCIETY, INC.

We salute you.

Worthy achievements do not go unnoticed.
We're delighted to celebrate tonight's honorees.
Steven Berkley, Robert Michele, CFA, and
Barbara Novick.

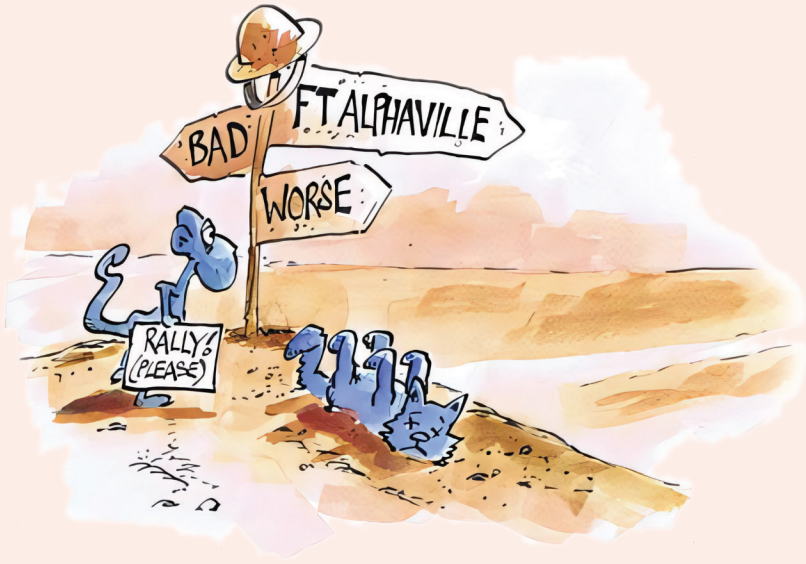
BlackRock

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FT

FINANCIAL
TIMES



Well, we thought
it was interesting.

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ALPHAVILLE

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