John J. Schmitz, PhD, CFA

John has been professionally managing global equity and equity derivative investment portfolios for over 20 years, and prior to that he acted as a consultant to investment management firms and funds. John has managed many different types of investment portfolios ranging from long-only mutual funds and pooled fund trusts to market neutral equity, net short equity and long-short equity hedge funds. He has also managed portable alpha strategies, as well as several arbitrage-based and event driven hedge strategies. John's expertise is the portfolio management of global equities and global equity derivatives using both highly sophisticated quantitative models, as well as traditional fundamental methods. He is also considered an expert in asset allocation and portfolio formation. John's current professional focus is his firm's global, common equity, fundamental, growth of dividends investment strategy which is often implemented with an options writing income generating overlay.

John has received several top money manager awards including the global GAIM awards for Best Early and Best Mid Stage Market Neutral Equity Manager in the World (2003), as well as a couple of Canadian Investment Awards for the Best Relative Value Hedge Fund (2004). In addition, John was the top performing Global Equity fund manager in Canada for calendar 2016 (out of the 747 unique Global Equity funds tracked by Fundata).

John has held Senior Vice President level portfolio management positions at Financial Concept Group (a subsidiary of Midland Walwyn Inc., and later Merrill Lynch Canada) and Maxxum Fund Management (later Mackenzie Financial, each subsidiaries of Investors Group). However, John is an entrepreneur at heart and since 2002 he has been President and CEO of SciVest Capital Management Inc., a London, Ontario, based registered portfolio management firm which he founded and holds majority ownership. At SciVest and its affiliates, John has managed teams of professionals and launched numerous investment products. While John has extensive Canadian experience, he also has offshore experience having previously been professionally based in The Bahamas for nine years overseeing Bahamas and Cayman Islands based investment entities, as well as the Canadian operations.

In addition to his professional duties, John is currently an Associate Professor of Finance (part-time) at the Richard Ivey School of Business at the University of Western Ontario teaching MBA-level Portfolio Management in one of the top MBA programs in the World. Previously, he taught a senior-level Investments course for a number of years at the Rotman School of Management at the University of Toronto. John has authored a number of refereed academic publications and practitioner articles, and has been a presenter at numerous academic and practitioner conferences and events. John is also currently a member of the Investment Committee at the London Community Foundation, one of Canada's larger community foundations.

John holds a BESc (Mechanical Engineering), a BA (Economics) and a DHS (Honors Economics) from the University of Western Ontario, a MA (Economics) from the University of Toronto, and a PhD (Finance) from the Richard Ivey School of Business at the University of Western Ontario. He also holds the Chartered Financial Analyst (CFA) designation.

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