



GEORGE GEORGIEV, CFA

Director of Research,
Portfolio Manager

About

George Georgiev, CFA, is the Director of Research and a Portfolio Manager at IRON Financial. He joined IRON Financial in 2018. George is responsible for the due diligence and research across asset classes, security, and portfolio analysis. In addition, he is responsible for building quantitative selection models for ETFs, mutual funds, and individual securities. George conducts qualitative and quantitative research for the selection process and assists in building and managing the IRON portfolios. Besides investment analysis skills, George is also well-versed in investment management statistical and machine learning techniques, along with portfolio optimization and risk management.

Before joining IRON, he was a Manager Research Analyst at Morningstar, Inc., where he performed due diligence and published Morningstar Analyst Reports on equity mutual funds and SMA strategies. Prior to Morningstar, George was an Analyst for Janus Henderson, responsible for portfolio analysis, market research, attribution analysis, and more.

George is a CFA Charter holder. In addition, he holds a Masters in Business Administration (MBA) with Distinction from the Kellstadt Graduate School of Business at DePaul University and a Bachelor's Degree in Business Administration from American University in Bulgaria.

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