



Biography

Robert B. Waldner, Jr., CFA®

Chief Strategist and Head of Macro Research
Invesco Fixed Income



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Rob Waldner is Chief Strategist and Head of Macro Research for Invesco Fixed Income (IFI). Mr. Waldner chairs the IFI Investment Strategy team (IST) and is responsible for oversight of the overall IFI investment process; he oversees portfolio risk monitoring and review for IFI portfolios. Mr. Waldner also leads the overall investment and business strategy for IFI's quantitative strategies, including factor and smart beta. He joined Invesco in 2013.

Prior to joining Invesco, Mr. Waldner worked with Franklin Templeton for 17 years, where he was a senior strategist and senior portfolio manager. He was the lead manager for the firm's absolute return strategies and a member of the fixed income policy committee. Mr. Waldner was instrumental in the launch of a number of new strategies on the Franklin Templeton fixed income platform. Previously, Mr. Waldner was a member of the macro team at Omega Advisors and a portfolio manager with Glaxo (Bermuda) Ltd. He entered the industry in 1986.

Mr. Waldner earned a BSE degree in civil engineering from Princeton University, graduating magna cum laude in 1986. He is a Chartered Financial Analyst® (CFA) charterholder.

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Beta is a measure of risk representing how a security is expected to respond to general market movements. Smart beta represents an alternative and selection index based methodology that seeks to outperform a benchmark or reduce portfolio risk, or both. Smart beta funds may underperform cap-weighted benchmarks and increase portfolio risk.