



Joseph Shim, CFA

Senior Vice President, Strategy Research,
Equities

AMERICAS

Research Affiliates, LLC
620 Newport Center Drive, Suite 900
Newport Beach, California 92660 USA
+1.949.325.8700
info@researchaffiliates.com

EUROPE

Research Affiliates Global Advisors
(Europe)
Ltd 16 Berkeley Street
London W1J 8DZ United Kingdom
+44 (0) 203 929 9880
uk@researchaffiliates.com

MEDIA INQUIRIES

Tyler Bradford
Hewes Communications, Inc.,
+1 (212) 207-9454,
hewesteam@hewescomm.com

Joseph Shim is responsible for research, product design, and analytics of the smart beta strategies of Research Affiliates. Research Affiliates is a global leader in smart beta, factor investing, and asset allocation. The firm creates investment strategies and tools based on award-winning research and delivers these solutions in partnership with some of the world's premier financial institutions. Joseph also conducts quantitative research and designs factor-based systematic equity strategies such as RAFI™ Multi-Factor. He leads the firm-wide effort in designing and implementing new RAFI ESG strategies.

Previously, Joseph designed PIMCO RAE™ systematic active equity strategies including RAE Fundamental, Low Volatility, and Income strategies. In addition, he has co-authored a number of articles published in peer-reviewed journals.

Prior to joining Research Affiliates, Joseph was a risk management consultant at Moody's Analytics and at Accenture. In his consulting role, he helped major commercial banks innovate business processes and implement Basel II credit risk management and asset-liability management systems.

Joseph has a BS in computer science and industrial engineering from Yonsei University, and Master of Financial Engineering from the UCLA Anderson School of Management. He holds the Chartered Financial Analyst® designation and is a member of CFA Institute and CFA Society Orange County.