

## **Claire M. Noel, CFA, Appointed Portfolio Manager At O'Shaughnessy Asset Management**

**STAMFORD, CT, June 15, 2021** — O'Shaughnessy Asset Management, LLC (OSAM), a leading quantitative asset management firm, today announced the appointment of Claire M. Noel, CFA, as Portfolio Manager. In the newly created role, she will be responsible for conducting quantitative research, devising investment strategy, incorporating ESG considerations, and overseeing portfolio rebalancing. Noel will report to Chris Meredith, CFA, Co-Chief Investment Officer of OSAM.

"We're pleased to welcome a professional of Claire's caliber who possesses such deep experience in quantitative analysis and programming," said Meredith. "We're actively expanding investment strategies available to clients on the firm's Custom Indexing platform Canvas. In addition, we're building custom strategies in collaboration with clients to meet specific investment objectives. Claire will be a strong contributor to the firm-wide efforts."

Noel was most recently a Partner at AJO Partners, an institutional investment manager based in Philadelphia, PA. At AJO, she served as a senior member of the portfolio management and quantitative research teams responsible for building diversified, value-oriented portfolios of U.S. and international equities. In addition, she co-led the firm's incorporation of ESG principles into the investment process. Prior to that, Noel was an Analyst and Principal at Turner Investments, an investment advisory firm based in Berwyn, PA. At Turner, she served as lead analyst for the Quantitative Income Fund among other responsibilities.

"I am genuinely delighted to join O'Shaughnessy Asset Management," said Noel. "A pioneer in quantitative analysis, OSAM has a rigorous process for research and portfolio construction. In addition, the firm possesses a truly incredible technology platform for executing investment strategies. I look forward to working closely with colleagues and clients alike."

Noel earned a B.A. in engineering sciences from Dartmouth College and a M.S. in computer and information science from the University of Pennsylvania.

### **About OSAM**

O'Shaughnessy Asset Management (OSAM) is a quantitative asset management firm based in Stamford, CT. The firm delivers a broad range of equity portfolios to institutional investors, individual investors, and high-net-worth clients of financial advisors. OSAM also serves as the investment advisor for a U.S. mutual fund and as a sub advisor to a family of mutual funds in Canada. The firm's team has managed client assets since 1996. For more information, please go to [www.osam.com](http://www.osam.com).

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