DANIEL J. KAPUSTA
Director, Davis Center for Portfolio Management
Department of Economic and Finance
University of Dayton
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PROFESSIONAL EXPERIENCE

• Director of the Davis Center for Portfolio Management and Lecturer in Finance at the University of Dayton *(Dayton, OH)*
January 2017 – Present *(7 years)*

Brings over 30 years of U.S. institutional equity investment experience to the classroom spanning from sell-side equity research to managing billion dollar portfolios for both one of the largest U.S. bank holding companies and a Fortune 500 insurance company. Oversee the Davis Center for Portfolio Management and teaches the following undergraduate finance courses: FIN 493 (seminar in equity investments); FIN 360 (investments) and FIN 301 (introduction to financial management). *The Davis Center is one of the flagship experiential learning programs in the School of Business Administration.* The Davis Center manages the Flyer Investments Fund, a portion of the University endowment and a portion of The Dayton Foundation. As of Decemberrr 31, the Fund's assets under management have grown to $72.6 million and according to the Center for Investment Research the Fund ranks as the **largest** student-managed portfolio in the U.S. Since 2010 these business undergraduate students have generated over $50 million in capital gains. These student-managers work in a high-tech, interactive center that simulates a Wall Street "buy-side" or asset management firm with tools such as Bloomberg, FactSet, Morningstar Direct, S&P NetAdvantage and The Wall Street Journal. The alumni of the Davis Center now total approximately 700 and work at some of the most respected investment firms on Wall Street, including Banc of America/Merrill Lynch, BlackRock, Blackstone, Bloomberg, BMO, Callan, Citi, Cleveland Research, Credit Suisse, Dimensional, FactSet, Fidelity, Fund Evaluation Group, Goldman Sachs, Houlihan Lokey, Jefferies, JP Morgan, KeyBank Capital Markets, Lincoln Financial, MIT Endowment, PNC Capital Markets, PIMCO, Robert W. Baird & William Blair.

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PROFESSIONAL EXPERIENCE

• Vice President & Senior Portfolio Manager at Fort Washington Investment Advisors -- a subsidiary of the Western & Southern Financial Group *(Columbus, OH)*
October 2004 - January 2014 *(10 years)*

Responsible with three partners for the research, start-up, implementation, equity research, portfolio management and institutional marketing of the small cap equity growth portfolio. Accomplishments include growing the product to approximately $900 million in assets in eight years. Clients include endowments, foundations, insurance companies, banks and corporate defined benefit plans. Generated compounded annual return of 13.57% for the five-year period ended December 31, 2013. Notable investments include: Affiliated Managers, Chipotle, Redbox, DSW, Lancaster Colony, Netflix, PVH, Panera, and Tractor Supply. Day to responsibility included equity research, portfolio management and marketing.

• Senior Equity Research Analyst at Banc One Investment Advisors now part of JP Morgan Chase *(Columbus, OH)*
September, 1992 – September, 2004 *(12 years)*

Responsibilities include making fundamentally based stock recommendations to the One Group mutual funds, primarily in the consumer sector. Accomplishments include significantly outperforming internally measured benchmark during nine of the twelve years. Bank One was acquired by JP Morgan Chase on July 1, 2004.

• Managing Director of the Growth Team at Banc One Investment Advisors now part of JP Morgan Chase *(Columbus, OH)*
April 1998 to May 2003 *(5 years)*

Responsibilities include the day-to-day portfolio management of the U.S. equity growth assets of Banc One mutual funds and its investment team of ten professionals. Asset oversight included the following Banc One mutual funds: Large Cap Growth ($2 billion), Mid Cap Growth ($3 billion) and Small Cap Growth (indirect/$700 million). Accomplishments include benchmark beating returns for both the Mid Cap and Small Cap Funds during tenor of growth team leader.

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PROFESSIONAL EXPERIENCE

● Assistant Fund Manager of the Balance Team at Banc One Investment Advisors now part of JP Morgan Chase *(Columbus, OH)*

1996 – 1998 *(2 years)*
Responsibilities included assistant portfolio management and equity research primarily the consumer sectors. Performance for the three year period: +19.26% vs. 15.82%/22nd percentile.

● Assistant Vice President – Equity Research at Robert W. Baird *(Milwaukee, WI)*

January 1987 – September 1992 *(5 years)*
Senior "sell side" equity research analyst for a leading regional brokerage firm primarily responsible for making stock recommendations of mid and small cap stocks located in the Midwest to both institutional and retail clients. Notable recommendations include Harley-Davidson (1988) which launched my investment career. Prior to promotion to AVP in 1988 was hired as an assistant equity research analyst at the firm.

EDUCATION

● Michigan State University

Master of Business Administration (MBA), Finance, General (December 1986)

● University of Wisconsin-Madison

Bachelor of Science (BS), Agricultural Economics (August, 1985)
Activities and Societies: 1981 UW Men's Soccer Team (reserve goalkeeper)