Dr. Stephen R. Rush, CFA

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Education

Ph.D. Finance, The University of Connecticut School of Business **2016**

Dissertation: Essays on Information Diffusion and Adverse Selection
2015 Finance Department Outstanding Ph.D. Student Scholar Award Recipient
2013 Finance Department Outstanding Ph.D. Student Scholar Award Recipient
2011 UConn School of Business Ph.D. Fellowship Recipient

MBA and M.Sc. Finance, Boston College **2011**

Ranked #2 MSF program in the U.S. by the Financial Times
Activities: Graduate Tech Trek West, 2011
Additional Studies: Mathematics, Harvard University, 2010

B.S. Business Administration, Bryant University **2007**

Concentrations: Finance and Economics
Honors: Magna Cum Laude in the Honors Program, Beta Gamma Sigma, Omicron Delta Epsilon
International Studies: Chinese, Capital Normal University, Beijing, China, Summer 2006

Organizational Membership

Chartered Financial Analyst
Membership: *Financial Management Association*

Recognition

First foreign lecturer invited to teach - *University of Economics and Law, Finance Department, 2018*

Academic Service

Editor, Science and Technology Development Journal: Economics - Law & Management

Fall 2020 to present

Academic advisor for approximately 40 students
BGSU College of Business Undergraduate Curriculum and Learning Assessment Committee

Member Spring 2019 - present

BGSU Library Advisory Committee

Chair Fall 2020 - present
Member Fall 2019 - Spring 2020

BGSU College of Business Graduate Advisory Committee

Member Fall 2016 to Spring 2018

Experience

Assistant Professor of Finance, Bowling Green State University **August 2016 to Present**

FIN 3000 and MBA 6060 - Financial Management
FIN 4350 and MBA 5510 - Investment Analysis and Management
FIN 4360 and MBA 5610 - Portfolio Management and Student Managed Investment Fund
Additional Teaching: Tianjin Polytechnic University, China

Associate Professor, University of Economics and Law, Vietnam **June 2018 to Present**

Doctoral Seminar in Corporate Finance
Investments for Undergraduate Honors Students

Finance Instructor, The University of Connecticut School of Business **August 2012 to May 2016**

FNCE 3101 - Financial Management
FNCE 3302 - Investments and Security Analysis
FNCE 4306 - Financial Services

Finance Lecturer, Bryant University **May 2012 to May 2016**

FIN 201 - Financial Management
FIN 312 - Investments
FIN 315 - Financial Institutions and Markets

Investment Analyst, Amica Mutual Insurance **August 2007 to December 2009**

Researched, recommended, and traded equities in the Technology and Alternative Energy sectors
Voted proxy statements on approximately 60 companies
Developed quantitative valuation models to evaluate individual company performance
Made weekly recommendations to the Chief Investment Officer and bimonthly written reports to the board of directors
Part of a team that managed approximately $5 billion across 6 portfolios beating the S&P 500

Fund Accountant, State Street Bank and Trust **June 2007 to August 2007**

Calculate NAV daily based on Bloomberg, Reuters, and IDC price and exchange rate information
Adjusting entries for share transactions, currency derivatives, expense accruals, and income payments
Fix failing trades and find missing information on non-DTC settled trades
Responsible for over $7 billion in assets under custody

Political / Military Analyst, U.S. Army Reserve **March 2005 to March 2007**

Wrote background papers for the European Command Joint Analysis Center
Coordinated analysis with reporting personnel

Sergeant, U.S. Marine Corps **August 1996 to February 2005**

Intelligence Chief - Provided the commanding officer with enemy strength, location, and probable courses of action
Platoon Sergeant - Supervised 35 Marines
Marine Band Pianist and Jazz Combo Leader

Research

Publications

Rush, S., 2018, The Bond Coupon's Impact on Liquidity *The Journal of Fixed Income* 27 (4), 34-39.

Louton, D., McCarthy, J., Rush, S., Saraoglu, H., and Sosa, O., 2015, Tactical Asset Allocation for U.S. Pension Investors: How Tactical Should the Plan Be? *Journal of Asset Management* 16, 427-436.

Rush, S. and Mirmirani, S., 2009, Can Increased Trade Prevent Conflict with China? *International Business & Economics Research Journal* 8.2.

Working Papers

A Network Analysis of Information Diffusion
Under Review

Currency Risk and Information Diffusion

Identifying and Pricing Adverse Selection Risk with VPIN
Under Review

Framing and Addressing Student Loan Problems for the Future of American Higher Education
Coauthored with Binh Bui at the University of Houston
Under Review

Ongoing Research

Broker Execution and Adverse Selection

When Does Asset Pricing Matter?

The Value of Growth

Pandemic Effects on Robinhood Trading
Coauthored with Hanh Nguyen at University of Toledo

Conference Presentations

2019 FMA Annual Meeting
2017-2018 R/Finance: Applied Finance with R
2016 Eastern Finance Association
2015 FMA Doctoral Student Consortium
2015 Vietnam International Conference in Finance
2013 Academic Forum
2012-2015 R/Finance: Applied Finance with R
2008 International Applied Business Research Conference

Invited Talks

2020 University of Toledo Statistics Department Seminar
2019 Shandong University Guest Lecture
2018 BGSU Finance Department Seminar
2018 BGSU Statistics Department Seminar
2017 BGSU Finance Department Seminar