Curriculum Vitae
Kevin Mak

Stanford Graduate School of Business
655 Knight Way
Stanford, CA
94305

Office: 650-724-3796
kevinmak@stanford.edu

Education

University of Toronto – Masters of Finance Graduate (2010)
University of Toronto – Bachelor of Commerce Graduate, Finance Specialist (2005)
Chartered Financial Analyst –Charter holder since December 2008
Canadian Securities Course

Employment

Stanford Graduate School of Business **January 2013 – Present**
Director of Real-time Analysis and Investment Lab, Lecturer of Management

Roles and Responsibilities:
- Teach MBA-level courses (Financial Trading Strategies)
- Guest-lecturer for GSB courses.
- Administer and oversee the operations of the Real-time Analysis and Investment Lab (RAIL)
- Manage budgetary and investment decisions for RAIL.
- Develop and deliver Executive Education programs.
- Develop and co-teach curriculum for a Stanford student managed fund
- Provide advice to other universities building their own trading labs.

Massdrop Inc **January 2013 – Present**
Advisor

Roles and Responsibilities
- Provide guidance, advice and coaching to senior management as it pertains to operations, organizational design, market analysis, developing human capital and strategy.
- Provide expertise in the field of marketplaces, liquidity formation, and financial modelling.
- Assist with fundraising efforts, strategy and process.
- Assist with executive recruitment.

306W Inc **June 2011 – Present**
Principle

Roles and Responsibilities:
- Develop trading simulation software for use at a global energy firm.
- Provide support and training for staff and users of the software.
- Assist in developing assessment tools used for the recruitment and promotion of traders.

Rotman School of Management **April 2005 – December 2012**
Senior Research Associate, Manager, Financial Research and Trading Lab (FRTL)

Roles and Responsibilities:

- Hire and train a team of 18 undergraduate lab assistants and manage the operations of the FRTL.
- Design assignment questions and lab lectures to be integrated with Rotman curriculum.
- Consult with faculty about data collection requirements and organize data gathering for research.
- Plan, oversee and manage the facility's annual budget.
- Co-founder and manager of the Rotman International Trading Competition, now in its 9th year.
- Co-inventor of the Rotman Interactive Trader (RIT) and Rotman Portfolio Manager (RPM) applications. Head of sales, support, quality assurance, and training for both platforms.
- Lecturing and Guest-Lecturing for undergraduate, MBA, MFIN, EMBA, and Exec Education courses.
- Developing and delivering Executive Education content for corporations.
- Manage corporate outreach programs and relationships between the FRTL and finance firms.

Maxlin Inc **April 2002 – December 2010**
Consultant

Roles and Responsibilities:

- Prepared expert witness documentation and testimony with respect to securities litigation cases.
- Developed dynamic portfolio allocation spreadsheet presentations for high net worth advisors.
- Developed an arbitrage algorithm that detects price anomalies and then executes trades between Canadian and US interlisted securities.
- Designed and analyzed financial models for long term electricity grid network planning.

Plus EV Investment Management **January 2009 – January 2015**
Principle

Roles and Responsibilities:

- Manage a private pool of capital and engage in value-oriented hedge fund investment strategies including but not limited to: deep value, volatility, fraud detection, merger arbitrage, preferred/warrant arbitrage, relative value.
- Build quantitatively driven sports-betting models used by professional sports bettors.

Courses and Lecturing

Lecturing Roles:
RSM434 / FIN562 – Financial Trading Strategies
FIN563 – Financial Trading Strategies 2
ECO183 – Stanford Cardinal Fund
Rotman Bridge 2 Business (1,2)– Executive Program
Rotman Financial Markets Practicum (1,2,3) – Executive Program
Navigating Through Economic Uncertainty – Executive Program
Buy-Side Trading Strategies – Corporate Program
Market Microstructure and Trading – Corporate Program

Guest Lecturing Roles (Stanford):
FIN310 – Advanced Managerial Finance (van Binsbergen)
FIN336 – The Finance of Retirement and Pensions (Rauh)
ACT341 – Alphanomics (Lee)
FIN350 – Corporate Financial Modeling (DeMarzo)
FIN361 – Behavioral Finance (Beshears)
FIN373 – Entrepreneurial Finance (Korteweg, Bernstein)

Guest Lecturing Roles (University of Toronto):
RSM230 – Introduction to Financial Markets (Booth, Huggins, Stapleton)
RSM330 – Investments (Stapleton, Wang)
RSM332 – Finance (Kan et al.)
RSM435 – Futures and Options (Buti, MacKay)
RSM2302 – Securities Analysis (Kirzner)
RSM2303 – Risk Modeling and Trading Strategies (McCurdy)
RSM2306 – Futures and Options (Bobey, Christoffersen, MacKay, Hull)
RSM2312 – Value Investing (Kirzner)
RSM2315 – Portfolio Management (Kirzner)
RSM4318 – Applied Portfolio Management (Kirzner, Stapleton)
RSM4319 – Portfolio Management and Trading Risk (McCurdy)
MMF1920 – Investments and Finance (McCurdy)
EMBA23, 24, 25 – Finance 1 (MacKay)

University of Fort Hare, South Africa – Equity Markets and Microstructure

Case Studies

Author/Co-Author of the following RIT cases developed at Stanford:
Behavioral Finance 1 – Bubbles
Behavioral Finance 2 – Overreactions to News
Quantitative Trading 1 – Quant Trading Strategies
Wealth Management 1 –Retirement Investment
Wealth Management 2 – Retirement Spending
Wealth Management 3 – Portfolio Diversification

Author/Co-Author of the following Rotman Interactive Trader case studies and tutorials:
Market Microstructure 1 – Order-Driven Markets
Market Microstructure 2 – Liquidity
Market Microstructure 3 – Alternative Exchanges
Price Discovery 1 – Market Equilibrium
Price Discovery 2 – Market Equilibrium 2
Fixed Income 1 – Time Value of Money
Fixed Income 2 – Bond versus Bills
Fixed Income 3 – Interest Rate Risk
Fixed Income 4 – Credit Risk
Options 1 – Puts and Calls
Options 2 – Hedging
Options 3 – Delta Hedging
Options 4 – Trading Volatility
Corporate Finance 1 – Mergers and Acquisitions
Algorithmic Trading 1 – Equity Arbitrage
Algorithmic Trading 2 – Algorithmic Market Making
Commodities 1 – Natural Gas Trading (with BP)
Commodities 2 – Crude Oil Supply and Demand (with BP)
QED 1 – Quantitative, Event Driven Trading (with Thomson Reuters)
MA 3 – Mergers and Acquisitions
Rates 1 – Trading Interest Rates, Spreads, and the Yield Curve
Sales & Trader – Sales & Trading across Exchanges (with Alpha ATS)
Analyst Trader – Equity Analysis and Earnings

Author of the following corporate case studies and tutorials:
Crude Flat Price Trading
Natural Gas Flat Price Trading
Crude Tender Trading
Gasoline Product Arbitrage Trading
Locational Basis Trading
Futures/Spot Contango Trading
Electricity Trading

Conferences

Speaker at the following academic conferences:
RISE Forum 2008-2011 – Redefining Investment Strategy Education – Trading Labs
GAME Forum 2012, 2013 – Global Asset Management Education – Trading Labs
RIT Users Conference 2010, 2012, 2014 – Implementing RIT in your Classroom
ACBSP 2011 – Utilizing Finance Trading Labs (With RISE Displays)
FMA 2013 – Experiential Learning in Finance (With S&P Capital IQ)

Attendee at the following academic conferences:
AACSB 2008, 2009, 2010, 2011
FMA 2009, 2010, 2011
AFA/ASSA 2011
NFA 2007, 2008, 2009, 2010, 2011

Media

National Television Interviews:
"Market Turmoil Strikes" – Global News (2008)
"The Rotman International Trading Competition" – Report on Business TV (2007)

National Print Quotations and Interviews:
"Hot Tech Start-Ups May Face a Long and Bumpy Fall" – New York Times (August 2015)
"Computer Programs let MBAs live in the moment" – Financial Post Executive (October 2011)
"Lab brings Bay and Wall Streets to Classroom" – Toronto Star (September 2011)
"A Chill Falls over Chinese Stocks" – CTV (June 2011)
"China's Appeal for Investors Takes a Hit" – Globe and Mail (June 2011)
"Students Profit From Lessons" – Toronto Star (September 2010)
"Students, Start your Spreadsheets" – Financial Post (October 2006)
"Reading Students tops at Rotman trading challenge" – National Post (February 2006)