Adi Agrawal

PhD, CFA

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PROFESSIONAL PROFILE

Insightful global multi-asset portfolio manager experienced in strategic and active asset allocation. Known for alpha generation and leading high-performing teams. Expert in macro analysis, fundamental research, and quantitative modeling. Collaborate with executives and stakeholders to drive investment strategy and performance.

- Multi-asset portfolio management
- Strategic and active asset allocation
- Manager selection and portfolio construction
- Hedging and risk management
- Alpha generation
- Macro, fundamental, and quant research
- Leadership
- System and process improvement
- Representing investment insights
- Cross-functional collaboration
- Strong written and verbal communication
- High attention to detail

WORK HISTORY

Natixis Advisors, LLC
11/2026 – present

Senior Vice President, Head of Quant Investment Research

- Lead quantitative research for direct indexing, tax-managed separately managed accounts and multi-asset model portfolios, covering portfolio construction, tax-aware optimization, back-testing and proprietary algorithms.
- Lead a team of quantitative researchers and set the research agenda.
- Work with portfolio management, technology and client-facing teams to prototype, validate and move investment tools into production, using AI tools to scale the research process.
- Oversee model risk: testing, validation and ongoing monitoring of proprietary and third-party models.

Writer
10/2025 – 11/2026 · Boston, MA

VP, Wealth and Asset Management Industry Lead

- Owned the end-to-end go-to-market strategy for the asset management vertical, from investment research and portfolio management to client reporting, compliance and distribution workflows.
- Worked directly with institutional C-suite partners on AI-driven transformation.
- Drove industry thought leadership: gave talks at the Bernstein Gen AI Symposium (London), Small Business Banking (Chicago) and the Banking Transformation Summit (Charlotte), moderated an “AI for RIAs” roundtable, and published six bylined articles on AI in wealth and asset management.
- Built a research agent that draws on primary sources (FRED, OECD, World Bank, SEC EDGAR), and published the SkyWise Research series of macro and AI-economy notes.

Strategy consulting
01/2025 – 10/2025 · Boston, MA

- Advised a hedge fund on trading architecture, refining strategy logic and auditing algorithmic accuracy to optimize trade execution and maximize risk-adjusted returns.
- Partnered with a risk platform to structure, position, and launch a proprietary investment fund.

Wellington Management
05/2011 – 12/2024 · Boston, MA

Managing Director, Portfolio Manager 01/2017 – 12/2024

- Developed and managed multi-asset portfolios across diverse mandates, including income, low-risk bond alternatives, liability-driven and return-seeking strategies, using advanced strategic asset allocation, manager research, and robust risk management.
- Led research on optimal long-term strategic asset allocation, incorporating long-term liabilities and return forecasts, efficient frontier modeling, and resampled risk-return optimization to align portfolios with client objectives.
- Directed tactical portfolio allocation, deploying active cross-asset, sector, and country positions through a hybrid process that combined fundamental analysis, quantitative modeling, and behavioral finance insights. Ran this Global Macro long/short portfolio with a long track record and high information ratio.
- Designed and implemented a systematic hedging strategy: cost-effective protection against deep drawdowns, integrating options-based hedging, delta replication, and constant volatility overlays with systematic signals and fundamental risk

assessments to forecast drawdown events. Ran this portfolio for several years with a high information ratio.

- Created and managed alternative risk premia portfolios with low market beta, using scenario analysis and risk budgeting for portfolio construction and monitoring.
- Structured and oversaw a long/short hedge fund portfolio using manager allocations, actively hedging aggregate market beta to achieve targeted risk profiles. Applied principal component analysis and fundamental research to isolate and manage idiosyncratic risk, uncovering persistent risk patterns.

Vice President, Global Multi-Asset Analyst 05/2011 – 12/2016

Conducted research and analysis on portfolio construction and alphas. Responsible for trading and oversight of multi-asset portfolios.

- Researched optimal hedging for liability-driven investment (LDI) plans, with a focus on understanding the liability structure and minimizing funded-ratio risk while incorporating risk-seeking elements.
- Built equity timing and cross-sectional foreign exchange (FX) models that generated alpha in different market environments, drawing on macro, valuation, and sentiment data.
- Researched and developed portfolio optimization algorithms based on constant-volatility and risk-budgeting for dynamic asset allocation.
- Developed a multi-asset dynamic factor-based risk model to analyze bias in fundamental and systematic manager portfolios.

ADDITIONAL WORK EXPERIENCE

MathWorks 05/2005 – 05/2011 · Natick, MA
Manager, Engineering

- Led a research and development team to design an architecture modeling language.
- Worked on Simulink and Stateflow, developing algorithms for optimizing code generation and improving the testability of the products.

IBM T.J. Watson Research 07/2004 – 05/2005 · Yorktown Heights, NY
Researcher

Researched a graph transformation-based framework for automated dynamic network realignment.

EDUCATION

PhD, Electrical Engineering Vanderbilt University, Nashville, TN 2004 · GPA 3.92
MS, Electrical Engineering Vanderbilt University, Nashville, TN 2002 · GPA 4.0
BE, Computer Engineering Pune University, Pune, India 2000

CERTIFICATIONS AND AFFILIATIONS

CFA Charterholder CFA Institute 2013 – present
Outreach Committee Member CFA Society Boston 2018 – 2024
Member Boston Economic Club 2025 – present
Certification Harvard Business School Investment Management Workshop 2018

PATENTS

- User interface for a modeling environment, US 9177452 (11/3/2015)
- Identification of semantically relevant concepts in a graphical model, US 8904302 (12/2/2014)
- Automated design for deployment of a distributed application using constraint propagation, US 7987461 (7/26/2011)
- Restricting state diagrams with a set of predefined requirements to restrict a state diagram to a state diagram of a Moore or Mealy machine, US 7840913 (11/23/2010)
- Hardware description language code generation from a state diagram, US 7503027 (3/10/2009)