



Surya Pisapati, CFA

Manager, Research & Portfolio Strategy
PFM Asset Management LLC

Surya Pisapati serves in the dual role of a senior manager research analyst with primary responsibility of domestic equity and a portfolio strategist within the multi-asset class management team. In her role, she is responsible for manager selection and oversight that includes sourcing new manager ideas as well as continued monitoring of existing allocations. She also assists the chief multi-asset class strategist in economic research and analysis and plays an integral role in communicating the investment process and portfolio decisions across the firm. Surya also serves as a member of the Multi-Asset Class Investment Committee and Economic and Capital Market Outlook Committee.

Prior to joining PFM in 2016, Surya served as director of investment at a local family office with experience including manager due-diligence, strategic and tactical allocation modeling and developing proprietary portfolio allocation and manager selection tools. She started her career working at Macquarie Group in Australia, as an investment analyst within a publicly listed real estate investment trust (REIT) fund.

Surya earned her Master of Science in Finance degree from Villanova University where she was awarded the Bartley Medallion in recognition of outstanding achievement in finance.



Contact

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Specialties

Asset Management

Education

B.S. in Mechanical
Engineering
Jawaharlal Nehru Technological
University (JNTU) College of
Engineering

M.S. in Finance
Villanova University

MBA
Indian Institute of Management

Professional Designations or Licenses

Chartered Financial Analyst
(CFA)

Started with PFM: 2016

Started in the Field: 2007