

**Louis Gagnon, Ph.D.**  
**Professor of Finance and Distinguished Faculty Fellow**  
**Smith School of Business, Queen's University**  
**Kingston, Ontario, Canada, K7L 3N6**  
**Curriculum Vitae - April 2018**

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**Twitter:** LGQSB

## Education

**Ph.D.** 1990, Finance, Faculty of Management Studies, University of Toronto  
Supervisor: Dr. John C. Hull

**M.Sc.** 1984, Finance, Faculté d'Administration, Université de Sherbrooke

**B.B.A.** 1982, Finance Major, Faculté d'Administration, Université de Sherbrooke

## Academic appointments

2011 - Professor of Finance, Smith School of Business, Queen's University.

1995 -2011 Associate Professor of Finance, School of Business, Queen's University.

1996-97 Visiting Professor of Finance, Richard Ivey School of Business, University of Western Ontario.

1989 - 94 Assistant Professor of Finance, School of Business, Queen's University.

1984 - 85 Professeur de Finance Temporaire, Faculté d'Administration, Université de Moncton.

1984 Chargé de Cours en Finance, Faculté d'Administration, Université de Sherbrooke.

1983 Chargé de Cours en Finance, Département des Sciences de la Gestion, Université du Québec à Trois-Rivières.

## Private sector appointments

1999 - 2000 Royal Bank of Canada, Toronto, Ontario  
*Senior Manager, Interest Rate Products, Group Risk Management, Trading and Insurance*

1998 - 99 Royal Bank of Canada, Toronto, Ontario  
*Manager, Research and Development, Risk Management - Trading*

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## Board Memberships

Director (Elected, third term), Northern Finance Association, 2017-2018.

President and Director, Northern Finance Association, 2016-2017.

Vice-President, Director, and 2016 Conference Co-Chair, Northern Finance Association, 2015-2016.

Director (Elected), Northern Finance Association, 2014-2015.

Associate Editor, Finance track, Canadian Journal of Administrative Sciences, 2017-

Action Editor, Finance, Canadian Journal of Administrative Sciences, 2012-2016.

Queen's University Alternative Assets Fund

## Research Awards and Distinctions

Distinguished Faculty Fellowship, School of Business, Queen's University, 2011-.

Ph.D. Student Delegate, Financial Management Association Doctoral Consortium, New Orleans, 1988.

Best Paper Award of the *Toronto Futures Exchange Essay Competition*, 1987 with monetary prize (with S. Mensah, and E. H. Blinder).

## Teaching Awards

Professor of the Year, Master of Finance (MFIN) Class of 2015

Professor of the Year, Master of Finance (MFIN) Class of 2013

Nominee, Professor of the Year, MBA Class of 2009, 2010, and 2011

Dean's Commendation for Teaching Excellence, Richard Ivey School of Business, University of Western Ontario, 1996-1997

Nominee, Commerce Society's Award for Teaching Excellence, 1993-1994

## Publications in Peer-reviewed Journals

Gagnon, L. and G.A. Karolyi, 2018. An unexpected test of the bonding hypothesis, *Review of Corporate Finance Studies* 7, 101-156.

Gagnon, L. 2018. Short sale constraints and single stock futures introductions. *The Financial Review* 53, 5-50.

Gagnon, L. and J. Witmer, 2014. Distribution of ownership, short sale constraints, and market efficiency: Evidence from cross-listed stocks. *Financial Management*, Fall 2014, p. 631-670.

Gagnon, L. and G.A. Karolyi, 2010. Multi-Market trading and arbitrage. *Journal of Financial Economics* 97, 53-80.

- Gagnon, L. and G. A. Karolyi, 2009. Information, trading volume, and international stock return comovements: Evidence from cross-listed stocks. *Journal of Financial and Quantitative Analysis* 44, 953-986.
- Gagnon, L. and G. A. Karolyi, 2006. Price and volatility transmission across borders. *Financial Markets, Institutions & Instruments* 15, 107-158.
- Gagnon, L. and G. A. Karolyi, 2003. Information, trading volume and international stock market comovements. *International Finance Review* 4, 351-381.
- Gagnon, L., G.J. Lypny, and T.H. McCurdy, 1998. Hedging foreign currency portfolios. *Journal of Empirical Finance* 5, 197-220.
- Gagnon, L. and G. J. Lypny, 1997. The benefits of dynamically hedging the Toronto 35 stock index. *Canadian Journal of Administrative Science* 14, 69-78.
- Gagnon, L. and G. J. Lypny, 1995. Hedging short-term interest rate risk under time-varying distributions. *Journal of Futures Market* 15, 767-783.
- Gagnon, L., 1994. Empirical investigation of the Canadian bond options market. *Canadian Journal of Administrative Science* 11, 2-11.
- Gagnon, L. and L. D. Johnson, 1994. Dynamic immunization under stochastic interest rates. *Journal of Portfolio Management* 20, 48-55.
- Gagnon, L., 1990. Exchange traded financial derivatives in Canada: Finally off the launching pad”, *Canadian Investment Review* 3, 63-70.
- Gagnon, L., S. Mensah, and E. Blinder, 1989. Hedging Canadian corporate debt: a comparative study of the hedging effectiveness of Canadian and U.S. bond futures, *Journal of Futures Markets* 9, 29-40.

## **Book chapters and monographs**

- Gagnon, L. and G.A. Karolyi, 2013. “International cross-listings”. *The Evidence and Impact of Financial Globalization*, First Edition. Gerard Caprio (Editor), Elsevier Inc. <http://ssrn.com/abstract=1638197>.
- Gagnon, L., W.J. Hurley, and L. D. Johnson, 1997. Recent advances in corporate bond management, in *Advances in Fixed Income Valuation Modeling and Risk Management*, Edited by Frank J. Fabbozi, FJF Associates, New Hope, PA.
- Gagnon, L., 1996. The competitiveness of the Montreal exchange interest rate futures market in the North-American context, Monograph, Montreal Exchange.

## **Working papers**

- Gagnon, L., Jeanneret, A., 2017. Stock Return Volatility, Investor Protections, and Financial Risk.
- Ding, Y., Gagnon, L. and Wang, X., 2017. The Impact of U.S. Securities Class Action Lawsuits Around the World. Available at SSRN: <http://ssrn.com/abstract=2400510>

Gagnon, L., G. A. Karolyi, and K. H. Lee, 2008. The Dynamic volume-return relationship of individual stocks: The international evidence. Available at SSRN: <http://ssrn.com/abstract=968672>.

### **Presentations at peer-reviewed conferences**

Gagnon, L., 2012. Overpricing, short sale constraints, and single stock futures listings. Inaugural conference of the Institut de la Finance Structurée et d'Instruments Dérivés (IFSID), Montréal, Québec, October 2012; 2013 FMA Europe, Luxembourg; 2013 Financial Management Association, Chicago.

Gagnon, L. and G.A. Karolyi, 2011. The economic consequences of the U.S. Supreme Court's Morrison v. National Australia Bank decision for foreign stocks cross-listed in U.S. markets. European Finance Association, Copenhagen, Denmark, 2012; Northern Finance Association, Niagara-Falls, Ontario, 2012; Financial Management Association, Atlanta, 2012.

Gagnon, L. and J. L. Witmer, 2009. Short changed? The market's reaction to the short sale ban of 2008. Infiniti Conference on International Finance, Trinity College Dublin, Ireland, June 2009.

Gagnon, L., G. A. Karolyi, and K. H. Lee, The dynamic volume-return relationship of individual stocks: The international evidence. American Finance Association, New Orleans, 2008; Northern Finance Association, Montréal, 2006.

Gagnon, L. and G. A. Karolyi, The dynamic volume-return relationship among cross-listed stocks (now titled "Information, trading volume, and international stock return comovements: Evidence from cross-listed stocks"). Financial Management Association, Chicago, 2005.

Gagnon, L. and G.A. Karolyi, Information, trading volume, and international stock market co-movements. Western Finance Association, San Diego, 1997; Northern Finance Association, Winnipeg, 1997.

Gagnon, L., The competitiveness of the Montreal Exchange interest rate futures market in the North American context. Northern Finance Association, Québec City, 1996.

Gagnon, L., G. J. Lypny, and T. H. McCurdy, Hedging foreign currency portfolios. Northern Finance Association, Vancouver, 1994.

Gagnon, L., I.G. Morgan, and E.H. Neave, Pricing Eurodollar time deposit futures contracts. French Finance Association, La Baule, 1993; Northern Finance Association, Halifax, 1993.

Gagnon, L., Empirical investigation of the time-dependent variance bond option pricing model. French Finance Association, Louvain-la-Neuve, 1991; Northern Finance Association, Banff, 1990.

### **Refereed conference proceedings**

Gagnon, L., I.G. Morgan, and E.H. Neave, Pricing Eurodollar time deposit futures contracts. Fourth Annual AFIR International Conference, Orlando, 1994; French Finance Association, La Baule, 1993; Administrative Sciences Association of Canada, Lake Louise, 1993.

Gagnon, L. and L. D. Johnson, The performance of dynamic immunization strategies using stochastic duration and convexity measures, Atlantic Schools of Business Conference, Halifax, 1992.

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Gagnon, L., 1991, Empirical investigation of the time-dependent variance bond option pricing model, French Finance Association, Louvain-la-Neuve, 1991.

### **Invited research seminar presentations**

“The economic consequences of the U.S. Supreme Court’s *Morrison v. National Australia Bank* decision for foreign stocks cross-listed in U.S. markets”. Concordia University, May 2012.

“Short changed? The market’s reaction to the short-sale ban of 2008”. Finance Seminar Series, HEC Montréal, May 2011; McMaster University, November 2010; Wilfrid Laurier University, April 2010.

“The Dynamic volume-return relationship of individual stocks: The international evidence”. Finance Seminar Series, School of Business, Queen’s University, October 2006.

“Multi-market trading and arbitrage”. Finance Seminar Series, School of Business, Queen’s University, December 2003.

“Information, trading volume, and international stock return co-movements”. University of Toronto, November 1997.

“The Montreal Exchange BAX contract: Performance, liquidity, and prospects”, 15<sup>th</sup> Annual Cash and Treasury Management Association (TMAC) Conference, October 1997; 13<sup>th</sup> Annual Canadian International Futures and Options (CIFO) Derivatives Forum, October 1997.

“The competitiveness of the Montreal Exchange interest rate futures market in the North-American context”, York University, October 1996; Bank of Canada, Financial Markets Division, March 1996; University of Western Ontario, December 1995.

“Hedging foreign currency portfolios”. Graduate School of the People’s Bank of China, Beijing, January 1996; University of Ottawa, February 1995.

“Pricing Eurodollar time deposit futures contracts”. Queen’s University, September 1993; HEC Montréal, 1993; Université Laval, March 1993.

“Empirical evidence on bond option prices in Canada”. University of Toronto, June 1990.

### **Invited keynote research presentations**

Montreal Exchange Conference Lunch on the Competitiveness of the Canadian Interest Rate Futures Market in the North-American Context. Sutton Place Hotel, Toronto, May 1996; Hôtel Westin Mont-Royal, Montréal, May 1996.

### **Research grants - Competitive**

#### **External Agencies**

- 2010 Social Sciences and Humanities Research Council of Canada, Sole investigator, \$51,111. 2010-2013.  
 1993 Social Sciences and Humanities Research Council of Canada, 1993-1995.  
 1991 Chicago Board of Trade Educational Research Foundation  
 1991 Financial Research Foundation of Canada

### **Queen's University**

- 2010 New Database Acquisition Competition  
 2010 Research Teaching Release, 2011-2010  
 2009 D.I. McLeod Term Research Assistantship, 2009-2010  
 2006 Queen's Office of Research Services, SSHRC 4A Grant  
 2005 Queen's Office of Research Services, SSHRC 4A Grant  
 2004 School of Business General Research Grant  
 2004 Queen's University Office of Research Services Travel Award  
 2004 D.I. McLeod Term Research Assistantship  
 2003 D.I. McLeod Summer Research Assistantship, 1993, 2002 and 2003  
 2003 D.I. McLeod Term Research Assistantship  
 2002 D.I. McLeod Summer Research Assistantship  
 2002 D.I. McLeod Term Research Assistantship  
 2001 D.I. McLeod Term Research Assistantship  
 1998 Queen's University Advisory Research Committee Research Grant  
 1998 D.I. McLeod Summer Research Assistantship  
 1994 Queen's School of Business Research Program, Teaching release  
 1994 Queen's School of Business Research Program, Research Funds  
 1993 Queen's School of Business Research Program, Teaching release  
 1993 Queen's School of Business Research Program, Research Funds  
 1993 Queen's University Advisory Research Committee Travel Grant  
 1991 Queen's School of Business Research Program, Research Funds  
 1991 D.I. McLeod Term Research Assistantship  
 1991 Queen's University Advisory Research Committee Research Grant  
 1991 Regional Research Workshop Fund, School of Business Research Program, with I.G. Morgan, E. H. Neave, and S. M. Turnbull  
 1990 Queen's University Principal's Development Fund

### **PhD Scholarships**

Social Sciences and Humanities Research Council of Canada, Doctoral Fellowship, 1986-1989.

Ontario Graduate Scholarship, awarded twice but declined due to SSHRC Doctoral Fellowship award.

A. A. Kinghorn Doctoral Fellowship, University of Toronto, 1987-1989.

University of Toronto Open Fellowship, 1985-1986.

## Teaching experience

### 1) Degree programs

School of Business, Queen's University  
Commerce Program  
COMM 321 Derivative Securities  
COMM 324 Investments and Portfolio Management  
MBA program  
MBAS 822 Financial Strategy  
MBAS 823 Investments  
MBAS 824 Management of Financial Assets  
MBAS 826 Risk Management  
MBUS 924 Investments and Portfolio Management  
Masters of Finance program  
MFIN 839 Risk Management  
Accelerated MBA program  
MBUS 813 Advanced Managerial Finance  
Executive MBA program  
MBUS 925 Financial Strategy  
Credit Officer Training Program - Saudi Industrial Development Fund  
MBAS 821 Corporate Financial Planning  
MBAS 926 Understanding Foreign Exchange  
Richard Ivey School of Business, University of Western Ontario  
BUS 453/653 Investments and Portfolio Management  
Faculté d'Administration, Université de Moncton  
Gestion Financière  
Finance Corporative  
Faculté d'Administration, Université de Sherbrooke  
FEC 222 Gestion Financière I  
Département des Sciences de la Gestion, Université du Québec à Trois-Rivières  
ADM 1065 Gestion Financière I

### 2) Executive (non-degree) programs

Queen's Executive Development Centre  
Queen's Executive Program  
Finance for Non-Finance Managers  
Entreprise Management Program  
Royal Sun Alliance Making Partner Program  
CUMA Entreprise Management Program  
Valuing Investment Projects, *Treasury Board of Canada*  
Montreal Exchange and Canadian Banker's Association  
Introduction to Risk Management  
Montreal Exchange  
Valuation Models for Interest Rate Derivatives  
McGill University's Canada-China Program (hosted by The People's Bank of China, Beijing)  
Understanding Derivative Securities

## Service to the finance profession

### Peer-reviewed journal editorial board

Associate Editor, Finance, Canadian Journal of Administrative Sciences, 2017-  
Action Editor, Canadian Journal of Administrative Sciences, 2012-2016

### Conferences/programs organized

Co-chair, 2016 Northern Finance Association Meetings, with Lynnette Purda.

2009 Canadian Stata Users Group Meeting, Member of Scientific Committee.

*Advanced Econometric Modelling* with Stata, 2007, a three-day econometric modeling and data management program featuring Dr. David Drukker, Director of Econometrics, StataCorp. Organizer and Host.

*Queen's Derivative Securities Conference*, May 1991 (inaugural year) and May 1992, Co-organizer with S. Turnbull, E. H. Neave, and I.G. Morgan.

### Ad-hoc reviewer – peer-reviewed journals (in alphabetical order):

Canadian Journal of Administrative Sciences; Contemporary Accounting Research; Economic Journal; Energy Economics; European Journal of Finance; Finance Économique Comptabilité; Financial Management; Global Finance Journal; Journal of Banking and Finance; Journal of Empirical Finance; Journal of Finance; Journal of Financial Economics; Journal of Financial and Quantitative Analysis; Journal of Futures Markets; Journal of International Business Finance; Journal of International Business Studies; Journal of International Money and Finance; Pacific Basin Finance Journal; Quarterly Review of Economics and Finance; Review of Asset Pricing Studies; Review of Financial Studies.

### Conference programs

Co-Chair, NFA 2016 conference

Session Chair, NFA 2016

Session Chair, NFA 2015

Discussant and Session Chair, FMA Europe, 2013.

Session Chair, European Finance Association, Copenhagen, 2012.

Session Chair, Financial Management Association, Atlanta, 2012.

Session Chair, Northern Finance Association, Niagara-Falls, 2012.

Discussant, Financial Management Association, Denver, 2011.

Session Chair, Northern Finance Association, Vancouver, 2011.

Discussant and Session Chair, Financial Management Association, New York, 2010.

Discussant and Session Chair, Northern Finance Association, Winnipeg, 2010.

Session Chair, QSB Behavioral Finance Conference, March 2010.

Discussant and Session Chair, Financial Management Association Meetings, Reno, 2009.  
Discussant, Global Asset Management Conference, McGill University, 2009.  
Session Chair, INFINITI Conference on International Finance, Dublin, 2009.  
Discussant and Session Chair, Financial Management Association, Salt-Lake City, 2006.  
Session Chair, Northern Finance Association Meetings, Montréal, Québec, 2006.  
Discussant, American Finance Association Meetings, Boston, 2006.  
Reviewer, Discussant, and Session Chair, Northern Finance Association Meetings, Vancouver (1994), Halifax (1993), Toronto (1992), Montreal (1991), Banff (1990).  
Reviewer, Discussant, and Session Chair, Administrative Sciences Association of Canada, Niagara-Falls (1991), Québec City (1992).  
Reviewer, Discussant, and Session Chair, French Finance Association Annual Meetings, La Baule, France, 1993.  
Reviewer and Session Chair, Derivative Securities Conference, May 1993.  
Reviewer, Queen's Centre for Canada-Asia Business Relations Conference, 1993 and 1994.  
Discussant, French Finance Association, Louvain-la-Neuve, 1990.

### **Conference Program Committees**

Western Finance Association Annual Meeting Program Committee, 2003-present.  
European Finance Association Annual Meeting Program Committee, 2013-present.  
Financial Management Association Annual Meeting Program Committee, 2005-present.  
Northern Finance Association Annual Meeting Program Committee, 2009- present.

### **Adjudication Committees**

Adjudication Committee 22 for Accounting, Finance, Operations Management and Management Science, Social Sciences and Humanities Research Council of Canada (SSHRC), Annual Research Grant Competition, 2003.

### **Ad-hoc reviewer – funding agencies**

Social Sciences and Humanities Research Council of Canada (SSHRC) annual research grant competition  
Hong Kong Research Grants Council (RGC)  
Établissement de nouveaux professeurs-chercheurs, Gouvernement du Québec  
Fond pour la Formation de Chercheurs et l'Aide à la Recherche (FCAR), Gouvernement du Québec  
Fonds de Recherche sur la Société et la Culture, Gouvernement du Québec  
Fonds de Recherche en Sciences Naturelles, Gouvernement du Québec

### **Graduate supervisions**

Line Drapeau, Ph.D. program, Smith School of Business, in progress.  
Yi Ding, Ph.D. program, Queen's School of Business, 2014, with Lewis D. Johnson.  
Jonathan Witmer, Ph.D. program, Queen's School of Business, 2006.

Murugesu Sivaraman, Ph.D. program, Queen's Economics Department, 1991, with Gregor Smith.

Vincent Didkovsky, M.Sc. program, Queen's School of Business, 2013

Rui Duan, M.Sc. program, Queen's School of Business, 2012

Jean-Philippe Dion, M.Sc. program, Queen's School of Business, 2010

Stephen Duck, M.Sc. program, Queen's School of Business, 2009

Simon Lauzon, M.Sc. program, Queen's School of Business, 2007

Ben MacDonald, M.Sc. program, Queen's School of Business, 2007

Dean Ciura, M.Sc. program, Queen's School of Business, 2004

Michel Sirois, M.Sc. program, Queen's School of Business, 1998

## **Ph.D. dissertation committees**

### **External examiner**

Laleh Samarbakhsh, Wilfrid Laurier University, 2015; Ines Gargouri, Concordia University, 2012; Rui Dai, York University, 2011; Siham Meknassi, HEC Montréal, 2011; Jun Zhou, University of Toronto, 2010; Long Chen, University of Toronto, 2002; Yan Yuhong, Hong Kong University of Science and Technology, 2000.

### **Examiner**

Xiaoxiao Wang, Queen's School of Business, 2013; Frederick Davis, Queen's School of Business, 2010; Kelvin Huang, Queen's School of Business, 2008; Merlyn Fu, Queen's School of Business, 2008; Hongping Tan, Queen's School of Business, 2006; Wei Wang, Queen's School of Business, 2006; Yunbi An, Queen's School of Business, 2005; Yu Du, Queen's School of Business, 2004; Davies, Queen's Economics Department, 2002; Shafiq Ibrahim, Queen's Economics Department, 2001; Tao Zheng, Queen's School of Business, 2000; Christine Parlour, Queen's Economics Department, 1995; Bruce McConomy, Queen's School of Business, 1995; David Wei, Queen's School of Business, 1995; Jeannine Farazli, Queen's Economics Department, 1995; Marie-Claude Beaulieu, Queen's School of Business, 1994; D. Graham Pugh, Queen's Economics Department, 1991; Paula Peare, Queen's Economics Department, 1991; Paula McLean, Queen's School of Business, 1990.

## **External thesis committees**

External examiner, M.Sc. Thesis, Frédéric Ducoulombier, École Supérieure de Commerce, Lille, France, 1996.

## **Independent study supervisions**

Nicholas Michalski, Commerce Program and Mathematics Department, 2008; Delphine Perrin, Commerce Program, on exchange from ESSCA, Angers, France, 2005; Joshua Heller, Commerce Program, 2002; Bruce Langstaff, Commerce Program, 1995; Frédéric Ducoulombier, Commerce Program (on exchange from École Supérieure de Commerce, Lille, France), 1994; Aaron Burleigh, MBA Program, 1994; Dan Cohn-Sfetcu, Commerce Program, 1993; Michael Clark, MBA program, 1993.

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## External research service activities

Member, Research Institute Committee, Canadian Institute of Chartered Business Valuators, 2003-2007.

## University service activities

### Queen's School of Business

Event lead and moderator, "The fall of Bear Stearns & Co", featuring Bill Bamber, Queen's MBA 1994 and co-author of "Bear Trap: the fall of Bear Stearns and the panic of 2008", Queen's School of Business (October 21), Queen's Business Club (Toronto -October 20, New York City - November 17, Montreal - November 19, Calgary - November 24, and Vancouver - November 25)

Chair, Faculty Forum, 2006 to 2007

Finance Area Coordinator, 2000 to 2003

Coordinator, Finance Research Workshop, 1990to 1995, 2000 to 2003

Faculty Lead, Finance Curriculum, Accelerated MBA program, 2004

Member, SSB Academic Appeals Committee, 2008-

Member, MBA Curriculum Review committee, 2001

Member, MBA Academic Progress committee, 2009

Member, MBA Science & Technology Ad-hoc committee, 2004

Member, EMBA Curriculum Review committee, 2003

Member, QEDC Oversight committee, 2001 to 2003

Member, QEDC Policy Development committee, 2001

Member, Research Committee, 1990 to 1993, 2000 to 2003,

Member, QSB-Cornell EMBA committee, 2003-2005

Member, QSB Recruitment committee, 2000

Member, Promotion, Tenure, and Review committee, 2000

Member, MSc/Ph.D. committee, 1993 to1994, 2010 to present

Member, Computing committee, 1991 to 1993

Member, International Exchange committee, 1996

### Queen's University

Member, School of Business Dean's Search Committee, 2001

Board Member, Queen's University Engineering Society Services Incorporation (QUESSI), Queen's Board of Trustees delegate, 1992-1997

Member and Queen's Senate Subcommittee representative, Michener Committee, 1993-1995

## In-the-News

### Opinion editorials

"Why we need tougher mortgage rules", Globe and Mail, March 23, 2010.

"It's time to pay our debt", The Queen's Journal, March 19, 2010.

“Fees and leverage: It would be tempting to call for massive re-regulation of the U.S. financial system; That would be a mistake”, National Post, September 26, 2008.

“Door wide open: Jérôme Kerviel's bosses at Société Générale should have noticed millions pouring in and out of the bank every day”, National Post, February 5, 2008.

### **Academic work cited in media**

“What bitcoin can teach us about the value of futures exchanges”, Globe and Mail, April 17, 2018.

“Curbs on shorting: A short respite for the short sellers”, The Economist.com, June 17, 2009.

“Montreal Exchange futures: CanPX start also seen helping”, DowJones Newswire, November 6, 1997.

“In Montreal, the politics of being no 2”, International Herald Tribune, September 6, 1997.

“Canadian futures outdo U.S. rivals: Institutional investors just don't know it yet, ME told, The Gazette, Montreal, May 15, 1996.

“Bourse de Montréal: Un fort potentiel pour les produits dérivés, La Presse, May 15, 1996.

“Montreal Stock Exchange - Competitiveness of the Canadian Interest Rate Futures Market”, Canada NewsWire, May 15, 1996.

### **Printed media citations**

“Big five Canadian banks' largest shareholders are...each other”, Huffington Post, November 1, 2017.

“Bloomberg braces for fallout; Competitors circle after terminal failure”, National Post, April 27, 2015.

“I believe in the integrity of Cdor’: Why Nova Scotia distanced itself from the Canadian benchmark rate”, National Post, February 21, 2014.

“Canada’s banking regulator to oversee Cdor in wake of global Libor probe”, National Post, January 14, 2014.

“Why Bank of Canada boss Stephen Poloz stopped worrying about debt, housing and hoarding”, National Post, January 2, 2014.

“Le TMX a un nouveau joueur dans les pattes”, Le Devoir, June 26, 2013.

“Only four days on the job, Poloz leans on Bank of Canada ‘confidence’, National Post, June 6, 2013.

“Selling options on stock in RRSPs is risky way to boost returns”, CBC.ca, February 11, 2013.

“Who is the Canadian linked with a series of reverse-merger failures?”, The Globe and Mail, December 27, 2012.

“Can Mark Carney save Britain's economy?”, The Daily Telegraph, December 1, 2012.

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“Julie Dickson is a candidate to be named the new governor of the Bank of Canada”, *Fredericton Daily Gleaner and New Brunswick Telegraph Journal*, December 1, 2012.

“What can we learn about leadership from Mark Carney?”, *The Globe and Mail*, November 29, 2012.

“After Mark Carney move, Bank of Canada will seek another ‘steady hand’”, *National Post*, November 29, 2012.

“Out of the cold and into the hot seat: Canadians see Mark Carney’s appointment as ‘mission to Britain’”, *The Daily Telegraph*, November 28, 2012.

“Will a new Bank of Canada governor shake up interest rates? ”, *CBC News.ca*, November 28, 2012.

“Carney’s move takes bankers by surprise”, *The Globe and Mail*, November 27, 2012.

“Carney represents ‘new blood’: In time of uncertainty, the Bank of England looks to an outsider”, *Toronto Star*, November 27, 2012.

“With Mark Carney’s exit, what does the Bank of Canada do again?”, *National Post*, November 27, 2012.

“Goodbye and thanks”, *Ottawa Citizen*, November 27, 2012. Also in *Vancouver Sun*, *Calgary Herald*, *Montreal Gazette*, and several other Postmedia newspapers.

“Mark Carney’s exit: A shock, but maybe it was inevitable”, *Macleans Magazine*, November 26, 2012.

“Shock, speculation greet Carney’s move to the Bank of England”, *The Globe and Mail*, November 26, 2012.

“Why such poor disclosure around CDOR? It affects \$6-trillion of investments”, *National Post*, October 11, 2012.

“Canada’s corporate tightwads vs. private spendthrifts”, *National Post*, August 25, 2012. Also in the *Vancouver Sun* and the *Calgary Herald*.

“Nexen-CNOOC takeover: U.S. regulators allege insider trading”, *Toronto Star*, July 30, 2012.

“RIM starts feel-good media blitz; Not a ‘Deathspiral’”, *National Post*, July 4, 2012.

“Flaherty tightens lending rules”, *National Post*, *Calgary Herald*, June 22, 2012.

“Moody’s RBC downgrade of shrugged off by investors, bank”, *Toronto Star*, June 22, 2012.

“Être propriétaire: un rêve moins accessible”, *La Presse*, June 22, 2012.

“Debt growth slows but income growth slows more”, *Globe and Mail*, June 16, 2012.

“Just say Non: What’s behind Stephen Harper’s refusal to pay into a European bailout fund”, *Macleans*, June 25, 2012.

“Expert says there’s no hiding from Euro woes”, *The Kingston Whig Standard*, June 6, 2012.

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“Banks have been hired – now the hard part”, Toronto Star, May 31, 2012.

“JPMorgan CEO faces shareholders; AGM held days after \$2-billion blunder”, Toronto Star, May 15, 2012.

“CMHC mortgage insurance may be reduced by the feds”, Canadian Business Magazine, May 14, 2012.

“Feds tighten reins on CMHC; New mandate means mortgage insurer must now weigh potential risks to the economy”, Globe and Mail, April 27, 2012. Also published on CTV.ca.

“Canada’s watchdog to oversee housing agency”, National Post, April 26, 2012. Also published in Montreal Gazette, Edmonton Journal, Victoria Times Colonist, Vancouver Sun, and other newspapers.

“Canada increases scrutiny of housing agency, bonds”, Reuters News, April 26, 2012.

“Why Mark Carney is a hot commodity; Finance specialists say speculation the Bank of Canada governor is being courted is only just beginning”, Ottawa Citizen, April 19, 2012. Also published in Montreal Gazette, Edmonton Journal, Windsor Star, Vancouver Province and the Victoria Time Colonist and a number of other daily newspapers.

“Fixed rates trump variable: BMO Tighter qualifying rules are expected”, The Montreal Gazette, April 2, 2012. Also published in the Vancouver Sun.

“Sino-Forest files for protection”, Toronto Star, March 31, 2012.

“Mortgage rates on the rise”, Castanet.net, March 31, 2012.

“Positive tone to debt level”, Kingston Whig Standard, March 24, 2012.

“Albertans carrying highest debt loads in the country”, Calgary Herald, March 23, 2012

“Canada Study Shows Wealthy, Educated Have More Debt”, Dow Jones Newswire, March 23, 2012.

“Household debt fears grow as rates appear set to rise”, National Post, March 22, 2012. Also Calgary Herald, Vancouver Sun, Nanaimo Daily News, Saskatoon Star Phoenix, Victoria Times Colonist, Regina Leader-Post, Vancouver Province and three other national daily newspapers.

“Greenberg family’s higher share price for Astral criticized”, Globe and Mail, March 20, 2012.

“Homebuyers: Beware market sucker punch”, Globe and Mail, March 19, 2012.

“Higher price for Greenberg family's Astral stock criticized”, Globe and Mail and CTV.ca, March 19, 2012.

“Strong medicine urged for a fevered real estate market”, Globe and Mail, March 16, 2012.

“OAS: Young caught in retirement crossfire”, Toronto Star, February 23, 2012.

“Sino-Forest issues warning about financial statements”, Toronto Star, January 11, 2012.

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“Fear moved markets this year”, National Post, December 23, 2011. Also published in Victoria Times-Colonist, Vancouver Province, Calgary Herald, Regina Leader Post, and six other newspapers.

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“Stock market turmoil”, CKLW Windsor, August 9, 2011.

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“Les Canadiens pourraient ressentir l’impact de l’agitation économique aux États-Unis”, La Presse Canadienne, Radio Canada International, August 8, 2011.

“The U.S. debt crisis”, The Motts ([www.themotts.ca](http://www.themotts.ca)), July 26, 2011.

“The U.S. debt crisis”, CJAD 800 AM Montreal, July 26, 2011.

“L’impact des nouvelles règles hypothécaires sur le marché immobilier de la côte-nord”, Radio-Canada, May 18, 2011.

“National securities regulator case goes to Canada’s Supreme Court”, CBC News, across Canada.

“Making sense of the proposed LSE-TMX Group merger proposal”, The Link, Radio-Canada International, February 10, 2011.

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- “Vale brise ses engagements envers Ottawa”, Radio-Canada Ontario, December 13, 2010.
- “Tim Horton’s ferme 35 restaurants dans le nord-est des États-Unis”, La Première Chaîne, Radio-Canada, November 11, 2010.
- “Too big to fail”, CBC Radio News, November 10, 2010.
- “Federal government blocks sale of Potash Corp”, The Link, Radio-Canada International, November 4, 2010.
- “La rencontre du G20”, Emission Spéciale sur le Sommet du G8 & G20 Radio-Canada Toronto, June 26, 2010.
- “The crise de la dette en Europe”, Radio-Canada National, May 25, 2010.
- “The Greek debt crisis is sending shockwaves through Europe”, *Y’a pas deux matins pareils*, avec Frédéric Bisson, Radio-Canada, May 7, 2010.
- “Obama demande à Wall Street de se rallier à la réforme”, *Au delà de la 401* with Sylvie-Anne Jeanson, Radio Canada Ontario, April 22, 2010.
- “Comprendre l’affaire Goldman Sachs”, Maisonneuve en direct, Radio Canada (coast-to-coast), April 20, 2010.
- “Canada’s mortgage lending market”, The World Today with John McComb, CKNW AM 980 - Vancouver, March 24, 2010.
- “The Canadian dollar’s recent surge against the U.S. dollar”, Christy Clark Show, CKNW AM 980 Vancouver, October 14, 2009.
- “The state of capitalism”, *Au delà de la 401* with Sylvie-Anne Jeanson, Radio Canada Ontario, October 2, 2009.
- “The Canadian economy”, CBC Radio’s Ontario Morning with Wei Chen, October 1, 2009.
- “One year after the economic shockwaves hit Canada, are we on the path to a long-term recovery?”, The Bill Good Show, CKNW Newstalk 980, September 15, 2009.
- “The ABCP market is coming back”, Maisonneuve en direct, Radio Canada (coast-to-coast), September 2, 2009.
- “Financial fraud victims band together to form a new national organization”, *Y’a pas deux matins pareils*, Radio Canada Ontario, August 31, 2009.
- “The Earl Jones Ponzi scheme”, *Au delà de la 401* with Sylvie-Anne Jeanson, Radio Canada Ontario, July 13, 2009.

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- “President Obama’s proposed reforms to the financial regulatory system”, CBC Radio News, June 17, 2009.
- “Are we on the verge of economic recovery or was this a bear market rally?”, The Bill Good Show, CKNW Vancouver, May 15, 2009.
- “ABCP credit ratings”, Investigative report with Gino Harel, *Heure des Comptes*, Radio Canada, May 5, 2009.
- “The Caisse de Dépôt et Placement du Québec’s investments in E-series asset-backed commercial paper (ABCP)”, Report by Gino Harel aired on *Désautels* with Michel Désautels, Radio Canada, May 4, 2009.
- “The G20 meeting”, *Au delà de la 401* with Sylvie-Anne Jeanson, Radio Canada Ontario, April 1, 2009.
- “The Ontario budget”, on *Désautels*, with Michel Désautels, Radio Canada, March 26, 2009.
- “The Ontario budget and the U.S. Treasury’s toxic asset purchase plan”, *Y’a pas deux matins pareils*, with Frederic Bisson, Radio Canada Ontario, March 26, 2009.
- “Canadian banks’ first quarter 2009 earnings” CBC Radio Syndication: Ontario Morning with Wei Chen, Windsor, Cape Breton, Thunder Bay, Corner Brook, Winnipeg, and Kelowna.
- “Business School enrollments are down: Is this a new trend shaping up?”, *Au delà de la 401* with Sylvie-Anne Jeanson, Radio Canada Ontario, January 21, 2009.
- “Will Nortel avoid bankruptcy?”, *Au delà de la 401* with Sylvie-Anne Jeanson, Radio Canada Ontario, January 14, 2009.
- “Will the plan for a national securities regulator fly?”, *Y’a pas deux matins pareils* with Frédéric Bisson, Radio Canada Ontario, January 13, 2009.
- “Looking back on the Canadian economy and the 2008 financial crisis”, *Au delà de la 401* with Sylvie-Anne Jeanson, Radio Canada Ontario, December 17, 2008.
- “The Bank of Canada cuts its benchmark rate: What does this mean for Canada?”, CBC Radio syndication: Toronto, Windsor, Winnipeg, Regina, Edmonton, Whitehorse, Yellowknife, Vancouver, and Victoria.
- “The Bank of Canada cuts its benchmark rate: What does this mean for Canada?”, The Bill Good Program, CKNW AM 980 - Vancouver, Live with questions from call-in listeners, December 9, 2008.
- “The Canadian economy and the political crisis in Ottawa”, *Au delà de la 401* with Sylvie-Anne Jeanson, Radio Canada Ontario, December 5, 2008.
- “The Canadian economy and auto sector bailout proposal”, The World Today with John McComb, CKNW AM 980 - Vancouver, interview conducted in the Vancouver studio, November 25, 2008.
- “How do you feel about the Canadian economy?”, Ontario Morning with Wei Chen, CBC Radio, November 24, 2008.

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- “The Canadian economy”, The Bill Good Program, CKNW AM 980 - Vancouver, Live with questions from call-in listeners, November 21, 2008.
- “Why are businesses facing a liquidity crisis?”, *Y’a pas deux matins pareils* with Frédéric Bisson, Radio Canada Ontario, November 13, 2008.
- “Where is the Canadian dollar headed?” CBC-Radio syndication in St. John’s, Fredericton, Sudbury, Gander, Windsor, Yellowknife, Victoria, Regina, and Vancouver, October 23, 2008.
- “Alan Greenspan’s testimony before the House” The World Today with John McComb, CKNW AM 980 - Vancouver, Live with questions from call-in listeners, October 23, 2008.
- “Paul Krugman wins the Nobel Prize in Economics”, *Au delà de la 401* with Sylvie-Anne Jeanson, Radio Canada Ontario, October 14, 2008.
- “Britain’s Gordon Brown: Savior of the world’s financial system?”, *Au delà de la 401* with Sylvie-Anne Jeanson, Radio Canada Ontario, October 15, 2008.
- “Is there light at the end of the tunnel? Important economic indicators to watch”, Ontario Morning with Wei Chen and CBC Radio Syndication: St-John’s, Quebec City, Victoria, Edmonton, Calgary, Kelowna, and Vancouver, October 14, 2008.
- “How long is the crisis going to continue?” The World Today with John McComb, CKNW AM 980 - Vancouver, Live with questions from call-in listeners, October 10, 2008.
- “Central banks cut interest rates in emergency move”, *Y’a pas deux matins pareils* with Frédéric Bisson, Radio Canada Ontario, October 8, 2008.
- “Chute des marchés boursiers”, *Au delà de la 401* with Sylvie-Anne Jeanson, Radio Canada Ontario, October 6, 2008.
- “What does the failed bailout package plan mean for Canada?”, Ontario Morning (with Wei Chen), CBC Radio, September 30, 2008.
- “The \$700 billion bailout of the U.S. financial system”, CBC Radio Syndication interview: Halifax, St-John, Charlottetown, Montreal, Ottawa, Windsor, Winnipeg, Calgary, Edmonton, Vancouver, and Yellowknife, September 29, 2008.
- “Lundiscussion: Le plan de sauvetage de G.W. Bush”, *Au delà de la 401* with Sylvie-Anne Jeanson, Radio Canada Ontario, September 29, 2008.
- “The \$700 billion bailout of the U.S. financial system is rejected: What does this mean for Canada?”, The World Today with John McComb, CKNW AM 980, Vancouver, Live with questions from call-in listeners, September 29, 2008.
- “What will be the fallout from the crisis on Wall Street?”, CBC Radio News, broadcast across Canada, September 17, 2008.
- “Should Canadians worry about the crisis raging on Wall Street?” The Drive, with Jim Elyot and Matthew Bisson, 98.9 Radio Kingston, September 17, 2008.

“The \$85 billion bailout of AIG ” on CBC Radio News Ottawa, September 16, 2008.

“Should Canadians worry about the crisis on Wall Street?” The World Today with John McComb, CKNW AM 980 - Vancouver, September 16, 2008.

“La crise financière à Wall Street devrait-elle inquiéter les canadiens?”, with Stephanie Morin, Bulletin de Nouvelles, Radio Canada Radio, broadcast nationwide on Septembre 15 & 16, 2008.

“Should Canadians worry about the current turmoil on Wall Street?”, Calgary Today with Mike Blanchard. CFQR Radio, September 15, 2008.

“L’Affaire Norbourg Financial: Further charges and arrests”, CBC Radio Canada Afternoon Business News, June 18, 2008, and CBC Radio Canada Business News, June 19, 2008.

“SocGen’s €5bn rogue trading scandal”, Radio Canada Toronto, *Au delà de la 401* with Sylvie-Anne Jeanson (Live, in-depth 10-minute interview, January 25, 2008)

“SocGen’s €5bn rogue trading scandal”, CBC Radio News, January 24, 2008.

### **Opinion letters – Capital markets**

“Simple steps to accountability”, National Post, May 3, 2007.

“Income Trust changes – plundering or a wise move? “, National Post, November 3, 2006.

“Good will fuss”, Report on Business, Globe and Mail, January 5, 1999.

### **Opinion letters – Other**

“Conrad Black vs. Rick Mercer is no contest”, National Post, October 4, 2006

“Who makes what”, Globe and Mail, April 9, 1996.

“Nobel honours”, Globe and Mail, October 26, 1995.

### **Queen’s Leaders Forum**

“Bear Trap: The Fall of Bear Stearns and the Panic of 2008”, Queen's Leaders Forum, Issue 19, 2008.

“The Wall Street crash of 2008: 1929 pales in comparison”, Queen's Leaders Forum, Issue 18, 2008.

“Seven lessons from the SocGen rogue trading scandal”, Queen's Leaders Forum, Issue 16, 2008.

### **Keynote presentations**

“Does diversification really mean less risk and a better return on investment”. Queen’s School of Business Webinar, November 2011.

“The limits of diversification”, QSB MBA Networking Breakfast Series, Toronto and Montreal, April 2011.

“Knowledge & Finance”, The Study of Knowledge Workshop, The Monieson Centre, May 2011.

“Where is the market headed in 2011?” QSB Business Forecast Luncheon, December 8, 2010.

“Reforming the world’s financial system: Rules versus principles”, The Ambassador’s Forum, Queen’s University, June 18, 2010

“The financial meltdown: what happened?” MBAST Class of 2004 Reunion, Alumni Weekend, May 22, 2009

“Lessons from the 2008 market meltdown”, ProBus Club of Kingston, September 9, 2009

“The credit crisis of 2008: How it happened and where do we go from here?”, 13<sup>th</sup> Annual Christmas Reception, CIBC Wood Gundy, Four Points by Sheraton Hotel and Suites Kingston, December 16, 2008

### **Service to the community**

Member, Investment Committee, The Community Foundation of Greater Kingston, 2008-.

Chair (2007) and Vice-Chair (2006), Parish Pastoral Council, St-Paul the Apostle Church, Kingston, Ontario.

Member (elected), Board of Directors, Kingston Christian School, 2003.

Co-organizer, “Drive for 25” Campaign, Kingston Christian School, 2003.

Canvasser, Canadian National Institute for the Blind, 2003