

Cboe Global Markets Launches Options Institute Academic Research Grant Program with Sponsors S&P Dow Jones Indices and MSCI

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- New grant program announced at RMC, Cboe's premier educational forum, held this year in Reykjavik, Iceland
- MSCI to sponsor research focused on inflation and its impact on the markets
- S&P Dow Jones Indices to sponsor research dedicated to dispersion

CHICAGO and REYKJAVIK, Iceland, Oct. 20, 2022 /PRNewswire/ -- Cboe Global Markets, Inc. (Cboe: CBOE), a leading provider of global market infrastructure and tradable products, today during its global Risk Management Conference (RMC) in Reykjavik, Iceland announced a new grant program developed by the Cboe Options Institute, naming S&P Dow Jones Indices (S&P DJI) and MSCI as the first grant sponsors.

The Options Institute believes that academic research is a driver of education, which is critical for Cboe's diverse customer base. The Options Institute Research Grant Program is designed to support research that helps catalyze the advancement of derivatives usage and financial exchange marketplace structures. Grant recipients will receive access to Cboe historical data sets to bolster their research efforts in one or more of the following research areas:

- Derivatives Products and Markets Performance
- Exchange and Marketplace Structures
- Operations and Risk Management
- Decision Theory

The Options Institute Research Grant Program is part of Cboe's goal to operate an inclusive global marketplace that helps all market participants better understand financial products, market data and trading strategies.

"Education is the key to enabling all types of investors to access global markets and help build a sustainable financial future," said Gina DeRaimo, Head of The Options Institute at Cboe. "Academic research is the foundation for innovation in our industry, and we are thrilled to have S&P DJI and MSCI supporting our commitment to advancing new ideas through rigorous research processes."

The Options Institute S&P Dow Jones Indices Dispersion Research Grant

S&P DJI is sponsoring a named research grant exploring dispersion as an asset class. The award recipient may claim Cboe data sets valued up to \$35,000, subject to applicable terms and regulatory approvals. The call for proposals will open November 1.

"S&P Dow Jones Indices is proud of our ongoing collaboration with Cboe and to sponsor this timely and essential research on dispersion. Market outreach and investor education are embedded in our company's DNA. S&P DJI has been providing data and analysis on dispersion, volatility and correlation for many years and we hope that this grant further advances and deepens the wealth of knowledge that is so crucial in today's markets," said Bruce Schachne, Chief Commercial Officer at S&P Dow Jones Indices.

Tim Edwards, Managing Director and Global Head of Index Investment Strategy at S&P DJI, participated in an analysis of dispersion at RMC, discussing how the measurement can be used to determine potential opportunities for adding value through stock selection.

The Options Institute MSCI Inflation Research Grant

MSCI is sponsoring a named research grant focused on advancing understanding of inflation and its measurable impact on the markets. The award recipient may claim Cboe data sets valued up to \$35,000, subject to applicable terms and regulatory approvals. The call for proposals will open November 1.

"At MSCI, we firmly believe that our clients can make better investment decisions when they are empowered with the information, data and tools to understand and analyze key drivers of risk and return. Managing the impact of inflation has increasingly influenced decision making processes in recent months, so we look forward to seeing the recipient of this grant create a valuable resource to help investors navigate this challenging environment and build more effective portfolios," said George Harrington, Global Head of Fixed Income & Derivatives, MSCI.

Hitendra Varsani, Managing Director at MSCI Research, will participate in the RMC panel "Navigating Inflation Top to Bottom in Equity Portfolios" on October 20.

The application period for the Options Institute Research Grant Program will run from November 1 through December 2, 2022. Interested candidates may reach out to OIAdmin@cboe.com for more details.

Cboe has been providing best-in-class investor education through the Options Institute (OI), teaching the responsible use of options and trading strategies for more than 35 years. OI educational content and programming is not only interactive, relatable and engaging for individual traders, but also covers the full spectrum of investing topics—from the basics to complex trading strategies—to guide investors as they grow throughout their educational journey. Through the OI Adjunct Faculty Program, students can also interact with renowned industry and academic leaders to learn from the best and brightest in our industry.

The OI is equally committed to serving institutional investors and has a long history of educating them on the utility of derivatives products. Each year, the Cboe Risk Management Conference (RMC) gathers top traders, strategists and researchers from leading institutions to learn about the latest products and strategies for managing risks and enhancing yields. This year, global leaders in the derivatives and digital asset markets are sharing their latest insights, research and real-market applications in a campus-like setting in Reykjavik, Iceland. Learn more at www.cboermc.com and follow along with #GlobalRMC22 on social media.

About Cboe Global Markets, Inc.

Cboe Global Markets (Cboe: CBOE), a leading provider of market infrastructure and tradable products, delivers cutting-edge trading, clearing and investment solutions to market participants around the world. The company is committed to operating a trusted, inclusive global marketplace, providing leading products, technology and data solutions that enable participants to define a sustainable financial future. Cboe provides trading solutions and products in multiple asset classes, including equities, derivatives, FX and digital assets, across North America, Europe and Asia Pacific. To learn more, visit www.cboe.com.

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RMC is an educational event for qualified institutional users of equity derivatives (such as institutional money managers, pension fund managers and consultants, insurance company professionals, or other financial industry professionals). The conference is not intended or suitable for individual investors. Attendance is limited to qualified, approved registrants. Registration and sponsorship may be restricted and may be approved at the discretion of the conference organizers.

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