DAN RUSSO, CMT

Portfolio Manager and Director of Research
at Potomac Fund Management

@DanRusso_CMT

linkedin.com/in/danielrusso/

"We believe in probability, not predictions."

SPEAKING TOPICS

Technical, Fundamental, and Quantitative Analysis
What analysis do you use for forecasting the market's outcome? Dan has experience with all these methods by studying past data and using probability to make decisions for the future. Learn from his perspective of what type of analysis is best for your strategy and learn the differences between all three.

Investment Strategy
Every investment strategy should be different depending on the market circumstances. What plans do you have in space to help investors achieve financial and investment goals?

Business Development
Launching a successful branch of your company doesn't happen overnight. How can you build a loyal base through daily and weekly market research reports? Learn how written market research can be beneficial to your business.

QUICK FACTS

- Portfolio Manager of Potomac since 2020
- Visited the NYSE for the first time at the age of 12
- Ran the 2016 NYC Marathon
- Launched Research by Potomac
- Technical Analysis enthusiast
- Teaches a technical analysis class at Baruch College in New York City

BIO

Dan has been in the securities industry for 22 years. He holds an MBA degree in Finance from Fordham University in New York City and a B.S. degree in Finance from Long Island University, C.W. Post. He is also a Charted Market Technician, having earned the right to use that designation in 2012.

He has experience with a wide range of institutional investors, working with them to perform fundamental, technical, and quantitative research to navigate the market and generate actionable trading and investment ideas.

At Potomac Fund Management, his primary roles include conducting technical and quantitative analysis, structuring portfolios of ETFs based on this analysis, and providing ongoing written research for the firm's financial advisor client base.

AS SEEN ON

Bloomberg TV, CNBC, TD Ameritrade Network, and more.

OFFERINGS AND RATES

Speaking fee negotiable based upon travel and time commitment.
Contact for more information.

CONTACT US

potomacfund.com
(888) 768-6622
info@potomacfund.com