

Matthew P. Duncan, CIPM

SENIOR INVESTMENT PERFORMANCE AND IMPLEMENTATION ASSOCIATE, VICE PRESIDENT

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Service Areas

Personal Touch

Investment Services

Education

University of Texas at Austin, BA in Economics (2008)

Certifications

Certificate in Investment Performance Measurement™ (CIPM®) certificate holder (2018)

At Sentinel Trust, Matthew is responsible for the day-to-day creation, maintenance, and publication of timely and accurate fund and client level performance. He supports the development and execution of performance-related projects and develops an understanding in several key areas, including, but not limited to, look-through performance. Additionally, he supports the ongoing development, maintenance, and implementation of the investment management process, including, but not limited to, data management, automation, trade execution, and reporting in collaboration with the Investment team.

Matthew is active with his college alumni network locally.

Professional Experience:

- Director of Performance and Risk, Bridgeway Capital Management, Houston, Texas (2019—2023)
  Responsibilities included managing production and automation of all attribution, fielding all ad-hoc requests for returns and risk statistics, writing all performance commentary and reviewing materials for data accuracy, discussing capabilities with portfolio management and research teams, and working with portfolio managers and research teams to incubate new products.
- Senior Marketing Operations Associate, Dimensional Fund Advisors, Austin, TX (2015—2019)
  Responsibilities included building and maintaining layouts/templates and managing production of global strategy suite, collaborating with IT to define business requirements for enhancements and to help test outcomes, working with Legal and Compliance departments to implement regulations for new and existing reports, and serving as Product Owner of the Fund Center on the Public Website.
- Performance Analyst, Invesco, Houston, TX (2012—2015)
  Responsibilities included gathering, calculating, analyzing, and distributing performance related information to end clients in Investments, Legal, and Marketing departments, performing outlier analysis, handling ongoing analysis of fund versus benchmark returns while reviewing material for performance and disclaimer accuracy, and managing the development of new processes to produce data.
- Transfer Agency Client Services Representative, Invesco, Houston TX (2011—2012)
  Responsibilities included identifying issues for shareholders/stockbrokers through clear communication, placing transactions for shareholders, and maintaining accounts for shareholders.

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