

**James R. Rieger CRC®**  
**516-524-1110**  
**JR@RiegerReport.com**

## Consulting Skills

- Deep knowledge of the U.S and global financial markets with a specialty in the bond markets
- Bond valuation specialist with specific focus on distressed fixed income securities.
- Effective expert witness related to the valuation of distressed fixed income securities
- ETF Fixed income benchmarking including index selection, index design and investment product positioning
- Author of the Rieger Report® which provides commentary and insights into the bond markets
- Engaging public speaker
- Passionate about municipal bonds
- Enthusiastic about the growing green bond market

## Experience

Experienced individual investor with a focus on tax-exempt municipal bonds, senior loans, inflation-linked and credit both investment grade and junk bonds.

Sole Proprietor of the Rieger Report® LLC. [www.straighttalkaboutbonds.com](http://www.straighttalkaboutbonds.com) Bond market commentary and implementable perspectives for the RIA and high net worth community.  
May 2018 - Current

Managing Director, Global Head of Fixed Income Indices at S&P Dow Jones Indices  
April 2015 – April 2018 (Retired from S&P after 36 years of service)

- Leading the strategy and business operations for S&P's fixed income indices efforts including driving S&P Dow Jones Indices global expansion in fixed income indices such as the innovative S&P 500 Bond Index family and the S&P Green Bond Index.
- Create and support investable bond indices including the S&P National AMT-Free Municipal Bond Index used by Vanguard and iShares as the basis of ETFs.
- Author of The Rieger Report providing periodic bond market commentary, analysis and insights.
- Frequent public speaker at forums on topics ranging from fixed income indices and benchmarks, complexity in the fixed income markets, municipal bonds, high yield and distressed securities as well as the derivative markets.
- Frequent interaction with Registered Investment Advisors regarding bond market education via conferences, working breakfast/lunch & learn presentations and multi-media content created specifically for that audience.

Global Head of Fixed Income Indices at S&P Dow Jones Indices  
September 2007 - April 2015

Adjunct Professor at Adelphi University, Robert B. Willumstad School of Business  
July 2012 - August 2012 Taught investment analysis course during summer session.

VP, Global Evaluations at Standard & Poor's Securities Evaluations, Inc  
January 2003 - July 2007 (4 years 7 months)

- Responsible for managing 40 professional evaluators who valued over 2.9 million fixed income securities each business day. Asset classes under my responsibility included municipal, corporate and sovereign bonds as well as derivative securities.
- Established the London desk as key element of global expansion strategy.
- Spoke at many industry events on topics ranging from bond markets, municipal bonds, bond valuations and distressed securities.
- Created and chaired the Standard & Poor's Securities Evaluations Bond Pricing Committee providing a layer of oversight and governance of the bond pricing business.
- Represented the organization at mutual fund client's Board of Director and Pricing Committee due-diligence meetings and presentations.
- Provided expert witness testimony on behalf of municipal mutual fund customers on four occasions.

### Industry Certification

- Certified Retirement Counselor®

### Education

- Adelphi University Master of Business Administration (MBA)
- Widener University BS, Business Administration

### Associations

- National Federation of Municipal Analysts
- Municipal Analyst Group of New York
- Fixed Income Analyst Society
- New York Society of Security Analysts
- Long standing member of the Chartered Financial Analysts Institute