

Employee's Name:	Antoine Villière
Title:	Middle Officer Fund
Manager:	Cristiano Cardoso
Review Period:	2023

PERFORMANCE REVIEW FORM

JOB DEFINITION

Attach a current position description; if applicable, make note of any significant changes since last year's performance review.

1. Retrocession calculations and processing.
2. Process automation and improvement: Using my programming skills, I have automated several key processes such as email dispatch, reconciliation of large client positions, aiming to improve operational efficiency.
3. Reporting: Sending the weekly report to Mediobanca and contributing to the ESG 2022 report and proxy voting.
4. Client relationship and Sales support: Developing monthly and quarterly reports to assist the sales department in identifying existing investors and potentials.
5. Collaboration with IT: Working closely with the IT department in the complete overhaul of the FMS system, aiming to improve it into a central tool for operational management and reporting.
6. Financial reconciliation for accounting: Developed a reconciliation tool for backloads following Antoine.V. request.

PROGRESS CHECK

If objectives were set at the last performance review, insert a copy of these goals, evaluate on the progress and comment.

Qualitative Objectives

5_Topped:	Results amongst the industry's best.	5_Topped	4_Exceeded	3_Achieved	2_Underdelivered	1_Failed	N/A_New/Not Applicable
4_Exceeded:	Results exceeded the target significantly.						
3_Achieved:	Results met the target.						
2_Underdelivered:	Results only met a portion of the target.						
1_Failed:	Results did not demonstrate adequate effort or competence.						
N/A_New/Not Applicable:	Employee has not been in position long enough to offer proportional results.						
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overall Score							

Quantitative Objectives

5_Topped:	Results amongst the industry's best.	5_Topped	4_Exceeded	3_Achieved	2_Underdelivered	1_Failed	N/A_New/Not Applicable
4_Exceeded:	Results exceeded the target significantly.						
3_Achieved:	Results met the target.						
2_Underdelivered:	Results only met a portion of the target.						
1_Failed:	Results did not demonstrate adequate effort or competence.						
N/A_New/Not Applicable:	Employee has not been in position long enough to offer proportional results.						
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overall Score							

PERFORMANCE COMPETENCIES

5_Exceptional: Performance is consistently superior and significantly exceeds position requirements.	5_Exceptional	4_Highly Effective	3_Proficient	2_Inconsistent	1_Unsatisfactory	N/A_New/Not Applicable
4_Highly Effective: Performance frequently exceeds position requirements.						
3_Proficient: Performance consistently meets position requirements.						
2_Inconsistent: Performance meets some, but not all position requirements.						
1_Unsatisfactory: Performance consistently fails to meet minimum position requirements; employee lacks skills required or fails to utilize necessary skills.						
N/A_New/Not Applicable: Employee has not been in position long enough to have demonstrated the essential elements of the position and will be reviewed at a later agreed upon date.						
1. Possesses skills and knowledge to perform the job competently and carrying out assignments <i>Brief explanation:</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Skill at planning, organizing and prioritizing workload, for self <i>Brief explanation:</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Skill at planning, organizing and prioritizing workload, for direct reports <i>Brief explanation:</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Holds self-accountable for assigned responsibilities; sees tasks through to completion in a timely manner <i>Brief explanation:</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Proficiency at improving work methods and procedures as a means toward greater efficiency <i>Brief explanation:</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Communicates effectively with supervisor, peers, and clients <i>Brief explanation:</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Ability to work independently <i>Brief explanation:</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Ability to work cooperatively with supervision or as part of a team <i>Brief explanation:</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Willingness to take on additional responsibilities <i>Brief explanation:</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Reliability (i.e. attendance, punctuality, meeting deadlines) <i>Brief explanation:</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Adeptness at analyzing facts, problem solving, decision-making, and demonstrating good judgment <i>Brief explanation:</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. Demonstrates a strong sense of ethics and integrity in decisions made <i>Brief explanation:</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overall Score						

ADDITIONAL PERFORMANCE COMPETENCIES FOR EMPLOYEES WITH SUPERVISORY RESPONSIBILITIES

5_Exceptional: Performance is consistently superior and significantly exceeds position requirements.	4_Highly Effective: Performance frequently exceeds position requirements.	3_Proficient: Performance consistently meets position requirements.	2_Inconsistent: Performance meets some, but not all position requirements.	1_Unsatisfactory: Performance consistently fails to meet minimum position requirements; employee lacks skills required or fails to utilize necessary skills.	N/A_New/Not Applicable: Employee has not been in position long enough to have demonstrated the essential elements of the position and will be reviewed at a later agreed upon date.
5_Exceptional	4_Highly Effective	3_Proficient	2_Inconsistent	1_Unsatisfactory	N/A_New/Not Applicable
1. Displays fairness towards all subordinates <i>Brief explanation:</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Identifies performance expectations, gives timely feedback and conducts formal performance appraisals <i>Brief explanation:</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Helps employees to see the potential for developing their skills; assists them in eliminating barriers to their development <i>Brief explanation:</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Delegates responsibility where appropriate, based on the employee's ability and potential <i>Brief explanation:</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Takes timely and appropriate corrective/disciplinary action with employees (i.e. mediation/conflict resolving) <i>Brief explanation:</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Takes specific steps to create and develop their diverse workforce and to promote an inclusive environment <i>Brief explanation:</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overall Score					



PERFORMANCE SUMMARY

1. List all aspects of employee's performance that contribute to his or her effectiveness.
2. List aspects of employee's performance that require improvement for greater effectiveness.
3. In what way is the employee ready for increased responsibility? What additional training will he/she need to be successful?

GOAL SETTING AND DEVELOPMENT PLANNING

A. List the employee's objectives for the coming year:

Qualitative Objectives

1. Enhancing collaboration with IT Department (e.g. general sales report, FMS improvement and speed).
2. Keep improving my autonomy in special requests (e.g. AUM reports), especially when dealing with precision and execution time.
3. Continuing to understand relationship between Investors, FMS and RAM AI.
4. Optimising reports generation for Mediobanca, RAM and Sales. Both on a monthly and quarterly basis.
5. Keep improving the ESG report and participating to new quantitative reports aiming to highlight accomplishments of the company.

Quantitative Objectives

1. Reducing rebates reconciliation time to one month.
- 2.
- 3.
- 4.
- 5.

(Should there be any changes to the objectives post mid-year review, please attach revised objectives below.)

B. How do these align with departmental goals?

My objectives aim to enhance operational efficiency and data accuracy. By leveraging my IT skills and continuously learning from my daily work, I ensure precise responses and analysis from the Middle Office.

This proactive approach aims to directly contribute to a better investor / distributor service and responsiveness, aligning with our department's focus on high quality and operational excellence.

C. List the employee's development goals for the coming year:

D. In the coming year, how will you provide guidance and assistance for the employee to accomplish his/her goals?



Employee's comments:

This annual performance review will become part of your RAM Active Investments personnel file. Please sign below to acknowledge that you have received this document.

Employee's Signature:

Date:

Manager's Signature:

Date: