



Bongani Patrick Mbambiso

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A hardworking, goal-orientated, leader with more than a decade and a half of hands-on working experience in the financial services industry. Highly skilled in Equity & Fixed Income Investment Analysis (both listed and unlisted), building Valuation Models, Portfolio Management, Asset Allocation, Risk Management, Economic and Market Research. Extensive knowledge of a wide variety of key economic industries and sectors. Team player with a multi-cultural background, and highly receptive to new environments.

WORK EXPERIENCE

Jan 2020 – Aug 2024: Chief Investment Officer | *Pilanehurst Asset Managers, Sandton*

- Directly oversee investment staff (both listed and unlisted investment teams).
- Formulate and recommend *investment strategies* to manage portfolios and enhance returns and reduce risk for clients.
- Provide ownership and adherence to the *investment philosophy* and *processes*.
- Provide guidance in the *portfolio construction*, *asset allocation*, and *investment product selection processes*.
- Managing all *external relationships* from a strategic point of view.
- Ensuring that all investment activities *comply with regulatory requirements and ethical standards*.
- Analysing *ESG data & metrics* from potential investments to assess their ESG performance and risks.
- Formulation of investment recommendations and decisions based on rigorous analysis, strategic alignment, and risk-return considerations.
- Market research & competitor analysis to assess market positioning, differentiation, and potential disruptors within target sectors.
- Assisting in the *management of investment portfolios*, *monitoring performance*, and making adjustments as necessary.
- Creating and maintaining detailed *financial models* to forecast future performance and evaluate investment risks and returns.
- *Industry monitoring* to stay updated on industry developments, regulatory changes, and market conditions to provide timely and relevant information to the investment team.
- Building and maintaining strong relationships with industry professionals.
- Collaborating and working closely with portfolio managers, analysts, and other team members to implement investment strategies.

Apr 2017 – Aug 2019: Portfolio Manager | *Umthombo Wealth, Sandton*

- Managing specific investment projects on day-to-day basis from start to finish.
- Contributing towards *quarterly strategy development* and compiling quarterly/monthly reports/presentations for clients.
- Performing *industry research* and analysing JSE listed companies in various sectors.
- Building financial/ performance/ risk monitoring/ mathematical *models and tools*.
- In-depth research of the global commodities, including forecasting trends/ directional moves of global commodity prices
- In-depth analysis of global/local macro and microeconomic drivers.
- Supervising, training and development of graduates.

Jan 2015 – Feb 2017: Portfolio Manager | *Cachalia Capital, Sandton*

- Performing industry research & analysing JSE listed companies (Equity analysis) in various economic sectors.
- Building financial and valuation models, and also involved in Portfolio management and Risk Management.
- Analysing global commodities, macro-economic price drivers, supply-demand dynamics, and forecasting prices.
- Compiling quarterly and monthly reports and presentations for clients.

Mar 2013 – Dec 2014: Senior Analyst and Portfolio Manager | *Mvunonala Asset Managers, Rosebank*

- Conducting in-depth research and analysis of the global/local commodity markets.
- Performing industry research and analysing JSE listed companies in various key sectors.
- Building financial models, portfolio management, making decisions with respect to investment portfolio positions.
- Involved in Investment strategy and Business Development, which included compiling quarterly reports and presentations for clients.

Jan 2008 - Feb 2013: Portfolio Manager and Equity Analyst | *Public Investment Corporation, Pretoria*

- Involved in the Management of the R30 billion-rand Internal Basic Materials Portfolio.
- Performing industry research, analysing small-to-mid cap mining and non-mining basic materials companies.
- In-depth research and analysis of the global commodities, and forecasting trends/ prices commodity prices.
- Performing industry research and analysing mid-cap and small-cap diversified mining companies.
- Building financial models, valuing companies, and making recommendations of stock allocation to internal fund.

PERSONAL INFORMATION: ° **Nationality:** South African ° **ID No:** 8105065722083 (DoB: 06/05/1981) ° **Driver's License:** Code 8

° **Languages:** English/Xhosa/Zulu (*Read, Write, Speak*); Tswana/Sesotho/Sepedi (*Speak*)

REFERENCES: * **Joe Kainja** (CIO: Umthombo Wealth & CIO: Mvunonala AM): - Ph: +27 83 444 8634/ 0115506184 * **Stephen Charangwa** (Head of Fixed Income, Umthombo Wealth) - Ph: +27 78 355 5234/ 011 318 0171 * **Khomotso Tefu:** CFO, Pilanehurst Asset Managers, - Ph: +27 72 292 7336 / +27 61 502 6061 / 011 593 3101

Oct 2006 – Dec 2007: Quantitative Analyst | *Public Investment Corporation, Pretoria*

- Managing and maintaining SQL databases to store vast amounts of financial data efficiently.
- Developing ETL processes to clean, process, and integrate especially economic data, and company fundamental data, before using it.
- Building and maintaining *predictive models*, i.e., *multifactor models* (macroeconomic factors, fundamental factors, and statistical factor models), using VBA, MATLAB, and C++.
- Building and maintaining *performance attribution* and *risk attribution* models for equity and fixed income portfolios.
- Building and maintaining *market risk measuring and managing* using VBA, MATLAB, and C++.
- Conduct comprehensive research and analysis of financial data, market trends, and economic indicators to support investment decisions.
- Communicating complex analytical findings to non-technical stakeholders in simple terms.

Dec 2005 – Sep 2006: Quantitative Analyst Intern | *Futuregrowth, Newlands, Cape Town*

- Using MATLAB and VBA to build and maintaining mathematical and statistical tools.
- Using SQL to maintain a research database.
- Building and testing a *machine learning* toolbox using MATLAB i.e. the toolbox identifies groups of stocks (*sectors*) which display similar behaviour, and time periods (*states*) for which the market sectors behave similarly, using maximum likelihood methods. The toolbox implements both a *deterministic recursive merging* algorithm as well as a *simulated annealing machine-learning* algorithm.

PERSONAL ATTRIBUTES AND COMPETENCIES

- A Team player with strong leadership and problem-solving skills, and is highly receptive to new environments.
- In-depth knowledge of global financial markets, and global commodities markets.
- Vast knowledge of the key economic industries (*Mining, Energy, Chemical, Building & Construction, Paper & packaging*)
- Hands-on experience in analysing listed & unlisted securities, portfolio construction, portfolio management and rebalancing
- Acquainted with regulatory policies such as GAAP, IFRS, and FAIS (passed RE1, RE5, & RE3 FAIS Regulatory Exams)
- Highly efficient in building and maintaining technical/financial/valuation/risk/attribution models for all asset classes
- Strong financial statements analysis skills (Credit Analysis, Corporate Governance / ESG Analysis skills).
- Good intuition for Statistics, Probability Theory, Linear Algebra and Calculus.
- Programing skills in *Python, VBA, and MATLAB*; *SQL* (SQL Server, MySQL, SQLite, and PostgreSQL).
- Proficient in using Git/GitHub for managing code and data analysis projects.
- Advanced skills in *Word, Excel, and PowerPoint*. Building *user-friendly dashboards within Excel*.
- Good understanding of *data governance practices, data privacy laws, and security compliance*.
- Highly efficient in large data handling, which includes *data collection* (using *Iress / I-Net, Bloomberg, Factset, Maitland, etc*), and *data pre-processing* (*data cleaning – handling missing values, & data transformation*),
- Performing Exploratory Data Analysis (EDA), including *data visualization* (using Matplotlib, Seaborn, Plotly in Python & other statistical packages), and *statistical analysis* (e.g. *Regression, Classification, Clustering, PCA, etc.*, using Excel, Python & other statistical packages).
- Proficient in *time-series analysis and forecasting* methodologies.
- Strong leadership and problem-solving skills, effective writing, presentation, and verbal communication, and
- Working with cross-functional teams.

EDUCATION

2011: MSc in Mathematics of Finance, *University Cape Town*, [Selected Relevant Courses](#):

- Probability Theory • Theory of Statistics • Multivariate Regression & Time Series • Multivariate Analysis and Modelling
- Financial Instruments and Related Markets • Portfolio Management theory • Mathematics of Derivatives Securities
- Stochastic Calculus • Theory of Arbitrage in Discrete and Continuous Times • Numerical Modelling

2004: BSc in Electrical Engineering, *University Cape Town*, [Selected Relevant Courses](#):

- Probability • Mathematics I & II • Computer Science • Fourier Analysis • Professional Comm. • New Business Venture Planning
- Power Eng. • Control Eng. • Elec. Machines • Digital Electronics & Microprocessors • Signal Processing • Telecommunications

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