

Romeo Olukotun

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I am a versatile, driven, and active Investments Professional who is currently looking for a fulfilling role in an exciting and expanding football business. I have gained valuable knowledge about the financial markets and football industry and developed a wide skill-set encompassing Football Finance, Portfolio Analysis, Research, Performance and Operations.

Industry Experience

China Post Global: Junior Investment Manager, ETFs

October 2021 – Present

- Assisting in managing diverse portfolio of ETFs, focusing on commodities.
- Executing daily variation margin movement, trading rebalances, as well as subscriptions and redemptions.
- Tracking and reporting fund performance metrics, contributing to monthly and quarterly reports.
- Assisting on firm market research and analysis for the Chinese economy.
- Contributed to maintaining consistent tracking difference and tracking error.

Octopus Investments: Senior Officer, Investment Operations

Dec 2019 – Dec 2021

- Executed daily trade instructions for discretionary managed accounts including inflows, withdrawals, liquidations, risk-profile switches and portfolio rebalances.
- Assessed and provided data daily for FCA required disclosure of 10% portfolio drops during reporting periods.
- Generated portfolio valuations including performance assessment on a quarterly basis as well as providing ad-hoc portfolio valuations.
- Go-to resource for performance related queries in the business.
- Assisted investment team with portfolio recommendations and rebalancing by using research, attending investment webinars and providing key takeaways.

Fisher Investments: Associate, Portfolio Management Group

Apr 2017 – Dec 2019

- Determined top-down asset allocation from all asset classes, Portfolio Analysis, Cash Flow Analysis, Risk Analysis, ad-hoc sector commentary and generated Morningstar analytical reports for high-net-worth individuals.
- Ensured high attention to detail with respect to portfolio analysis and compliance with client guidelines, as well as internal and regulatory processes.
- Conducted ad-hoc excel modelling for internal processes to improve efficiency and accuracy of portfolio analysis.
- Took initiative by managing own workflow, various projects, and presenting on areas of improvement to an excellent standard.
- Training Coordinator: provided training to new starters in the team to ensure high-quality production from day one, as well as served as a resource to multiple departments on client and investment queries.

Queen Mary Masters Investment Fund: Equity Analyst

Oct 2015 – Jul 2016

- Gained practical work experience in Trading, Investment Strategy, and Portfolio Analysis.
- Conducted research and generated reports on different companies, sectors, and drivers.
- Suggesting solutions to Investment Officers when required.
- Constructed discounted cash flow.

Skills

- **IT:** Comfortable with all MS Office, Xtrader, Bloomberg, Morningstar, Thomson Reuters Datastream, Eviews, and Apple Mac software.

Professional Qualifications and Education

Football360: Pro Series Course

Oct 2023 – Present

- Intensive course covering the financial aspects of football management, including club valuations, player transfers, and revenue generation strategies.

CFA Level 1 & 2

Oct 2022

- Topics including Financial Statement Analysis, Equity Investments, and Alternative Investments.

FCA Authorised

Oct 2022

Investment Management Certificate

Aug 2018

Queen Mary University of London

Sept 2012 – Dec 2016

- MSc (Hons) Investment & Finance: Dissertation on Portfolio Construction Theory (Merit).
- BSc (Hons) Mathematics, Statistics & Economics (2:1).

Hendon Secondary School

Sept 2004 – Jun 2012

- A Levels: Mathematics (A), Psychology (A), Law (B).
- GCSEs: 11 A - C grades including A* in Maths, and A's in English, Science, and Business.

Voluntary Work and Further Positions of Responsibility

Octopus Investments: Giving Leader

Dec 2019 – Present

- Represented the Operations department of circa 40 members to co-ordinate volunteering initiatives and fundraising.
- Organised virtual fundraising event to successfully raise £1,500 for various charities.
- Assisted in the donation of £500 for Prostate Cancer UK.
- Recognised by the CEO and owner for being the most successful team in Q4 2020 for volunteering engagement.

QMFC: Captain and Treasurer

Sept 2013 – Mar 2014

- Worked as part of the committee for the Queen Mary University Football Club.
- Tasks included managing the budget for the year to pay for expenses for over 100 members.
- Part of team that made record savings for the club.
- Co-led 1st team to league championship and highest finish in university's history.

Organisation for Young Africans: Trainee

Sept 2009 – July 2011

- Worked as part of a small team to assist the running of a supplementary school for underprivileged secondary school children.
- Covered for absent Maths teachers and taught extra Maths and Science classes to students.

Interests

- Football:** Current member of Old Blues football team (Amateur Level).
- Football Finance:** Avid listener of the Price of Football podcast, subscriber to Swiss Ramble.
- Cheerleading:** World Championship Participant (2018) and European Silver Medallist (2017) representing England, National Champion (2015,'16,'17 and '18).
- Camp Counsellor:** Camp Lokanda: Effectively acted as an older sibling, mentor and teacher to children aged 7-17 years old for 8 weeks. Gained a cultured experience, keeping me open minded and provided an enthusiasm to prepare for the unexpected.
- Acting & Performance:** Currently represented by Buttercup Agency Ltd.