

# 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**

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### **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**

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### **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 1<sup>st</sup> 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**

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- ☐ **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.