Classification: Public

Alexander Harry Magnusson CIMA Adv Dip MA

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Personal Statement

Highly passionate professional with extensive experience within the banking sector. Skilled in Data Visualisation, Financial and Customer Analytics and Senior Stakeholder Management. Demonstrable history of strong commercial awareness, successful delivery of data analytics and implementation of new visualisation tools leading to robust forecasting.

Employment/Work Experience

Lloyds Banking Group *September 2016 to Present*

Consolidation Forecasting Senior Manager *March 2019 – Present*
Forecasting – Savings Products, Retail

- Consolidating an executive level view of the Personal Current Account and Savings Deposit Balance Sheet and 4 Year Operating Plan (over £250bn)
- Leading the Quarterly forecasting on the Group's Savings Balance Sheet (over £150bn) and Net Interest Margins
- Presenting forecasted Budgets to Senior Stakeholders, accompanied with financial analytics for both internal planning and reporting (including Treasury) and external reporting (including PRA)
- Implementing Pricing Change decisions, affecting forecasted Net Interest Margins of the Group
- Managing a team of 3 Junior Forecast Managers
- Managing a team of 2 Graduates
- SME on Savings Machine Learning (SML) project
- Leading SML Minimum Viable Product feedback sessions and steering the Product Roadmap Refinement sessions, discussing solutions to current roadblocks and reporting these to the Senior Leadership Team
- SME on Personal Current Account Machine Learning project
- Agile project management experience
- Use of JIRA for managing projects on Customer Behaviour analytics
- Training forecasting team on use of Tableau
- Frequent SQL queries from Group Data Warehouse
- Radicalised Customer Behaviour analytics within the Savings department
- Software used: SQL, Group Data Warehouse, Excel, Tableau, Microsoft Office, JIRA, Google Analytics, PowerBi, Alteryx, Microsoft Access

Junior Forecasting Manager *August 2018 to March 2019*
Forecasting – Savings Products, Retail

- Led the Quarterly forecasting on the Group's Savings Balance Sheet (over £150bn) and Net Interest Margins
- Presented forecasted Budgets to Senior Stakeholders, accompanied with financial analytics for both internal planning and reporting (including Treasury) and external reporting (including PRA)
- Implementing Pricing Change decisions, affecting forecasted Net Interest Margins of the Group
- SME on Savings Machine Learning project
- Leading on Savings Machine Learning Minimum Viable Product feedback sessions
- SME on Personal Current Account Machine Learning project
- Agile project management experience
- Use of JIRA for managing projects on Customer Behaviour analytics
- Training forecasting team on use of Tableau
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Lloyds Banking Group – Analyst *September'16 to August'18*

Associate Relationship Manager – Global Corporates; Industrials and Financial Institutions; Banking

- Analysed company consolidated management and financial results to assess credit worthiness of prospective clients
- Manipulated MI Data to create regular GC Industrials Monthly analysis reports
- Created Project Management Tracker Tool to improve efficiency of potential client deals
- Wrote and reviewed multiple credit papers for large corporate product deals
- Prepared client meeting notes to prepare various members of Senior Management Team for client meetings; Senior Managers included Relationship Directors, Management Directors, Head of Global Corporates, Lloyds Chairman and CEO

Manager – Enterprise Wide Risk Management; Ring Fencing

- Created risk reporting and balance sheet analytics tools for the Non Ring Fenced Bank (NRFB)
- Produced risk profiles for the NRFB
- Assisted in submitting the Banking License Application for the NRFB to the Prudential Regulation Authority (PRA) and Financial Conduct Authority (FCA)
- Co-created procedures for analysing Large Exposure Regulatory breaches
- Successfully implemented rollout of Tableau to collate and visualise NRFB Balances and Credit Risks
- Created and ran monthly people framework and performance management reports

Analyst – Client Asset Management; Portfolio Analytics

- Introduced a crucial quarterly Market Share dashboard
- Spearheaded analysis to increase client lending utilisation and greatly improve capital efficiency
- Produced deep dive analysis on Mid-Market clients, leading to trigger actions within Capital Markets teams and developed systems to improve relationship manager conversations with existing and potential clients

Education and Qualifications

CIMA	Strategic Level in progress Management Level (Adv Dip MA) attained
APMG-International	Agile Project Management in progress
University of Southampton	B.Sc. Accounting and Finance *Graduated July 2016 with 2:1*

Key Skills

- Financial Accounting and Reporting: Strong
- IFRS & IAS Accounting Standards: Strong
- Microsoft Office Package: Developer
- VBA Coding: Developer
- Tableau: Developer
- SQL: Strong
- Interpersonal Skills
- Stakeholder Management Skills
- Strong Commercial Awareness
- Attention to detail
- Time Management
- Proactive

References available upon request