

# ALEXANDER MCGINN

## PERSONAL INFORMATION

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## EDUCATION

2011                      McGill University

*Bachelor of Science*                      Cofounded Neuroscience Undergraduate Society. Member of the McGill Investment Club. Learned critical thinking skills. Studied how cognitive biases inform the decision making process. Learned how to understand technical scientific papers and communicate using a scientific and precise vocabulary.

## PROFESSIONAL ACCREDITATIONS

CFA Institute                      2015 · CFA Level II Candidate  
CAIA Association                      2015 · CAIA Level II Candidate  
CSI                      2014 · Financial Markets Risk Management Course  
2012 · Derivatives Fundamentals and Options Licensing Course  
2011 · Canadian Securities Course

## WORK EXPERIENCE

Oct 2013–Present                      Product Research Analyst, INVESCO CANADA

*Summary*                      Multi-disciplinary role with responsibilities in three broad areas:

*Portfolio Oversight*                      Preparation/maintenance of portfolio attribution for portfolio managers which facilitate their investment decision making. Responsibilities include analyzing portfolios to understand their construction, the attributes of the securities within a portfolio, what factors investment managers are exposed to, what risks are present within the portfolio and how much of the risk budget is spent on different factors. This gives investment managers a clearer understanding of the inherent risks the portfolio is facing which can facilitate the decision making process. Also involved in oversight of asset allocation portfolios and ensuring tactical limits have not been breached. Responsible for preparing/analyzing risk oversight packages that provide a detailed overview of portfolio activity, performance drivers, portfolio characteristics, and factor risk exposures.

*Sales Support*                      Assisted and supported product research team and product managers

*Competitive Intelligence*                      Assisted and supported product research team and product managers

July–Sept 2013                      Product Marketing Intern, INVESCO CANADA

*Summary*                      Coordinated with multiple partners to promote and maintain product brands. Clearly and effectively communicated to ensure successful execution and timely delivery of projects.

2010–June 2013                      Client Relationship Associate, INVESCO CANADA

*Summary*                      Built relationships with financial advisors and their staff. Learned their business and client needs, and recommended investment solutions. Provided information on investment products, and provided competitive analysis on those products. Discussed individual client accounts and scenarios, and

provided: tax information and forms, information on administrative procedures, investment product ideas. Also discussed the broad macroeconomic environment and its relevance to the investment advisor's business and their clients.

#### OTHER SKILLS

<i>Cognitive</i>	Analytical, verbal, research, numeracy, strategic, and critical thinking skills
<i>Software</i>	Excel, Bloomberg, Factset, Style Research, Word, PowerPoint, Morningstar Direct, Zephyr StyleADVISOR, Linux, Python, Matlab
<i>Languages</i>	' English, Conversational French

June 29, 2015