

BOYA CHIOU

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SOCIALS
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EXPERIENCE

CATHAY SITE, CATHAY FINANCIAL HOLDINGS

06/2019 – 06/2021

Taipei // *Portfolio Manager, Multi-Asset*

Cathay SITE is the largest asset management company in Taiwan, with assets from DIM and mutual funds totaling US\$40 billion.

- Participated roadshows, product presentations for private banking, high-net-worth individuals, professional investors and institutional clients, and raised NT\$ 7-10 billion new AUM
- Conducted investment strategies and contributed 3 new product ideas, including high dividend and REITs funds
- Managed equity fund, fund of funds, multi-asset, private placement fund and generated favorable risk-adjusted returns
- Ensured that client portfolio management activities are in compliance with company policies, including fund of funds, REITs funds and private placement funds

CATHAY LIFE INSURANCE, CATHAY FINANCIAL HOLDINGS

10/2017 – 10/2018

Taipei // *Associate, Investment Research*

Cathay Life Insurance was the first publicly-listed insurance company in Taiwan and the largest buy-side investor. Its Cathay Holdings has one-quarter of the country's AUM. The company is the only financial institution in Taiwan in the Global Fortune 500.

- Screened and evaluated investment opportunities by conducting in-depth investment analysis, including industry & company research, valuation analysis, and financial modeling
- Provided market research and analysis report, at the end of 2018, gave recommendations to sell Nikkei 225 and avoiding the -20% decline of the year
- Generated alpha strategy, investment thesis and an empirical study of dividend growth strategy, which outperformed the market in the coming quarter
- Created a portfolio attribution analysis module using Python and automated abnormal stock volatility calculations using VBA to optimize workflow

KAMAKURA CORPORATION

01/2017 – 10/2017

Taipei, Kuala Lumpur, Singapore // *Consultant, Quantitative Analysis*

Founded in 1990 by Dr. Donald R. van Deventer, Kamakura Corporation is the world's leading provider of risk management solution, represents a broad and diverse cross-section of in-depth experience in economics, financial management, information technology, credit modeling, banking and regulatory oversight.

- Collaborated with client project teams on data collection, analysis, and corporate ALM risk model construction to control the interest rate risk of the bank book and liquidity risk to support their business and reporting needs
- Use Python, SQL and quantitative tools to assist product development and create data analysis processes
- Support other overseas projects

CRÉDIT AGRICOLE CORPORATE AND INVESTMENT BANK

03/2014 – 11/2015

Tokyo // *Analyst*

Crédit Agricole CIB is the corporate and investment banking arm of Crédit Agricole Group, the 12th largest banking group worldwide in terms of tier 1 capital.

- Conducted financial modeling of capital market activities for each trading desk and liquidity index report to support management's capital budgeting decisions and signified liquidity risk
- Created an automation process to automatically document reports for complex projects and saved 64 man-day using SQL and Python
- Selected projects

SKILLS & CERTIFICATES

- Good experience in managing client portfolios with risk-adjusted returns
- Sound knowledge of asset management and financial modeling techniques
- Licensed Senior Securities Specialist (Registered in April 2019), Securities Investment Trust and Consulting Professionals (Registered in May 2019), and working towards the CFA designation
- Proficient programming skills in Python, VBA and SQL. Rich industry experience in asset allocation and backtesting

EDUCATION

UNIVERSITY OF TOKYO

2011 – 2013

M.A., Public Policy | Tokyo, Japan

Concentration: Economics & Econometrics

NATIONAL TAIWAN UNIVERSITY OF SCIENCE AND TECHNOLOGY

2006 – 2010

B.A., Business Administration | Taipei, Taiwan

Concentration: Finance & Accounting (GPA 3.84/4.00); eligible for the CPA exam for New York State

UNIVERSITY OF PARDUBICE

2008 – 2009

Exchange Program, Economics and Administration | Pardubice, Czech Republic