

Boya Chiou

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Boya is currently a Portfolio Manager, managing multi-asset/REITs portfolios at Cathay SITE, Taiwan's largest asset management company with over \$30 Billion AUM. Boya has developed expertise in investment analysis, asset allocation, and portfolio management with about 7 years of working experience in the financial industry. Boya also worked in close collaboration with other Tier 1 global Private Equity partners for alternative product design and delivery for private banking, high-net-worth individuals, professional investors, and institutional clients.

WORK EXPERIENCE

Jun 2019 —

Portfolio Manager, Cathay SITE, Cathay Financial Holdings, Taipei **Investment Analysis/Portfolio Management**

- Designed, constructed, implemented, and maintained alternative investment, REITs fund of funds. Expected annualized return 6-12%, sharp ratio > 1.5-2.5. Passed down knowledge and procedures to following fund
- Optimized, implemented, and maintained fixed income/bond ETF fund model and portfolio
- Public non-listed REITs, covering the full spectrum of real estate sector; residential, multi family, hotel hospitality, retail, industrial and healthcare centers, etc
- Roadshow, product promotion for private banking, high-net-worth individuals, professional investors and institutional clients, etc
- Product structure
- Department budgeting and planning

Dec 2018 — May 2019

Assistant Manager, Taishin Financial Holdings, Taipei **Investment Analysis**

- Conducted fundamental investment analysis of Nikkei 225, TOPIX, power, utilities, infrastructure, renewable energy
- Uncovered an undervalued utility stock, which rebounded by over 391% within 1 month
- Monitored sector news promptly and concisely conveyed information to stakeholders; delivered daily, monthly, and quarterly commentary
- Non-cyclical stocks

Oct 2017 — Oct 2018

Senior Specialist, Cathay Life Insurance, Cathay Financial Holdings, Taipei **Investment Analysis**

Cathay Life is the largest life insurance company and buy-side investor in Taiwan, with an AUM: USD\$ 267B As of 2020

- Created and maintained financial models, valuation frameworks, and investment theses
- Presented and defended investment recommendations to portfolio managers and made profitable calls for infrastructure stocks and Nikkei 225 Index
- Conducted Nikkei 225, TOPIX high dividend growth portfolio construction strategy, based on an empirical study
- Created a portfolio attribution analysis module using Python and automated abnormal stock volatility calculations using VBA
- Infrastructure, non-cyclical stocks

Jan 2017 — Oct 2017

Consultant, Kamakura Corporation, Asia-Pacific **Quantitative Analysis**

- Provided pre-sales support and advised institutional clients on ALM (Asset Liability Management) analysis framework, including hedge fund, asset management, financial conglomerate banking clients in the Asia Pacific
- Developed statistical models and data analysis pipelines using Python and SQL database

Mar 2014 — Nov 2015

Analyst, Crédit Agricole Corporate and Investment Bank, Tokyo

- Conducted financial modeling of capital market activities and liquidity index report to support management's capital budgeting decisions and signified liquidity risk
- Supported the Treasury Unit for overnight rates calculation and liquidity control
- Programming assignments for internal trading tools development using Python and SQL database

Feb 2010 — May 2010

Intern, U.S. Chamber of Commerce, Washington D.C.

- Supported policy campaigns, high-level events, and meetings, e.g. luncheon with Prime Minister of Singapore, President of Vietnam, Vice President of Spain, African Union Trade & Investment Talk, and American diplomats with representatives from client companies
- Screened investment and business headline in Pakistan and updated and modified investment guidelines
- Promoted online campaigns by giving timely updates for business events of the US-Pakistan Business Council

LANGUAGE / TECHNICAL SKILLS

- **Licenses & Certifications:** Senior Securities Specialist (證券商高級業務員 Registered in April 2019), Securities Investment Trust and Consulting Professionals (投信投顧業務員 Registered in May 2019), expecting AICPA exams in 2021 (eligible for USCPA New York State)
- **Programming:** Python, SQL, data analysis, backtesting
- **Languages:** Mandarin Chinese (native), English (fluent; TOEIC 965), Japanese (intermediate; JLPT N1 Mock 117/180)

EDUCATION

2011 – 2013

Master of Public Policy

University of Tokyo, Tokyo, Japan; Concentration: Economics

2006 – 2010

Bachelor of Business Administration, GPA 3.8/4.0

National Taiwan University of Science and Technology, Taipei, Taiwan;

Concentration: Finance & Accounting, eligible for the CPA/AICPA New York exams

2008 – 2009

Economics, 1-year Exchange Program, Full Scholarship Awarded

Univerzita Pardubice, Pardubice, Czech Republic