

CALEB ONG JUN YI, FRM, CAIA

Experienced in investment and financial data analytics and analysis.

- Chartered Financial Analyst (CFA®) Program – Passed Level II, Level III candidate (exam date: Nov 2021)
- Financial Risk Manager (FRM)
- Chartered Alternative Investment Analyst (CAIA)

EDUCATION

2015 Jul
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2018 Jul

Bachelor of Accountancy (Hons) Nanyang Business School, Nanyang Technological University

- Attained the Nanyang Business School Professional Attachment Book Prize in 2017 for best overall performance for the degree of Bachelor of Accountancy

PROFESSIONAL EXPERIENCE

2018 Sep
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Present

- ### Investment Data Analyst PromiseLand Independent Financial Advisers Pte Ltd
- Explore and develop new ways to work with data relating to financial modelling and investment research
 - Contribute investment and financial specialist knowledge as a subject matter expert where required, using data driven approaches
 - Conduct research on global markets to identify thematic investment ideas and strategies for investment products (ETFs, Unit Trusts, Stocks)
 - Formulate investment insights that incorporate market updates, market risk analyses, and house views
 - Work directly with the Director of Investments in overseeing AUA of over SGD \$250M
 - Conduct portfolio optimization across multiple and within single asset classes, subject to investment objectives and constraints
 - Co-manage the company's portfolio allocation model (globally diversified synthetic Fund-of-Funds)

Key Projects/Responsibilities

- Creator and maintainer of proprietary bottom-up fundamental financial models to set target prices of US listed equities (<https://git.io/JDN9a>)
- Creator and maintainer of econometric models to forecast market and sector trends (<https://git.io/JDN9r>)
- Creator and maintainer of currency forecasting models to forecast currency trends (<https://git.io/JDN9y>)
- Contribute to company's house views, and publish quarterly market reports (<https://git.io/JD80m>)

INTERNSHIP EXPERIENCE

2017 May
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2017 Jul

- ### Business Consulting and Advisory Executive Business Intelligence and Analytics Pte Ltd
- Conducted private company valuation using Discounted Cash Flow analysis
 - Assisted in working capital budgeting for private companies

2016 May
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2016 Jul

- ### Business Executive Wine Epicure Pte Ltd
- Conducted market research into current trends in the Blue Chip wine industry
 - Performed data reconciliation and verification of current inventories

CONTACT INFORMATION

✉ calebongjunyi@gmail.com

☎ +65 9220 6931

🔗 [GitHub Portfolio](#)

in [LinkedIn](#)

For more information, please feel free to reach out.

PROFICIENCIES

💻 Programming Languages:
R

📊 Data Analysis Skills:
Data Extraction
Data Manipulation
Data Visualization
Large Datasets Handling
Web Data Scraping
Sentiment Analysis

🔧 Quantitative Skills:
Statistical Modelling
Portfolio Optimization
Performance Attribution
Monte Carlo Simulation
Time Series Analysis
GARCH Modelling

💻 Software Applications:
RStudio IDE
Bloomberg
FE FundInfo