

# CALEB ONG JUN YI, CFA, FRM, CAIA

## Experienced in investment and financial data analytics and analysis.

- Chartered Financial Analyst (CFA)
- Financial Risk Manager (FRM)
- Chartered Alternative Investment Analyst (CAIA)

## EDUCATION

2015 Jul  
|  
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  
|  
Present

- ### Investment Analyst
- PromiseLand Independent Financial Advisers Pte Ltd
- Work directly with the Director of Investments in overseeing AUA of over SGD \$250M
  - Explore and develop new ways to work with data relating to financial modelling and investment research
  - 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 market forecasts
  - Contribute investment and financial specialist knowledge as a subject matter expert where required, using data driven approaches
  - 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 systematic, bottom-up fundamental financial models to set price targets 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  
|  
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  
|  
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](mailto:calebongjunyi@gmail.com)

☎ +65 9220 6931

🔗 [View my GitHub Portfolio](#)

🌐 [View my 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

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

💻 Software Applications:  
RStudio IDE  
Bloomberg  
FE FundInfo