

MATTHEW OLDHAM CFA

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ANALYST AND RESEARCHER

Experienced analyst with a proven track record of exceeding expectations, learning and thinking outside the box. Ability to analyze and research, along with the ability to effectively recommend and communicate findings has led to ongoing career progression, and a growing academic publishing record. Seeking a research role to extend my expertise and research skills, with the aim of producing novel insights.

AREAS OF STRENGTH AND EXPERTISE

- Data Analytics
- Asset Allocation
- Valuations
- Budget Forecasting
- Fundamental equity research
- Strategic Planning & Analysis
- Financial Modeling Tools
- Mergers & Acquisitions
- Portfolio construction
- Project Management
- Relationship Building
- Valuations

TECHNICAL PROPHECIES

- Agent-based modeling
- NetLogo
- Python
- Social Network Analysis
- R
- Tableau
- Machine Learning
- Gephi
- Microsoft Office suite

PROFESSIONAL EXPERIENCE

Equity Trustees Limited, Melbourne, Australia

2006 to 2014

Investment Analyst (2008-2014)

Performed stock analysis for assigned sectors to ensure consistency with the team's "resource based" framework. Identified "value drivers" and associated signposts, completed valuation work and modeling and made recommendations to the investment team. Produced monthly investment performance reports and reviewed and recommended mutual funds based on extensive analysis and trends. Forged long-lasting relationships with company and industry associates while performing and presenting client reviews.

Key Accomplishments:

- Maintained a disciplined long-term, team-based approach to EQT Wholesale Flagship Fund. Awarded the "recommended rating" from Lonesec for this team approach and superior performance.
- Present services to key internal stakeholders based on extensive research, analysis and sound business acumen.

Corporate Development Analyst (2006-2008)

Performed corporate merger and acquisition tasks including identifying potential acquisitions and completing financial modeling. Acted as liaison with outside investment bankers, legal and accounting consultants and ensured due diligence in all work. Made effective and clear presentations and recommendations to Board members.

Key Accomplishments:

- Spearheaded the acquisition of Lifetime Planning and Aged Care Services, resulting in becoming the growth engine for EQT's Private Wealth Services business
- Led OAMPS Superannuation from Wesfarmers Limited, which added 30% of FUM to EQT's Corporate Superannuation business.
- Increased FUM of the Corporate Superannuation business by 25% through the acquisition of the Freedom of Choice Superannuation Platform from Australian Bay and MBC Superannuation from Elders.

EDUCATION AND TRAINING**Computational Social Science PhD Program***GEORGE MASON UNIVERSITY | Fairfax, VA | *Expected Completion December 2018***Presidential Scholar***Master of Arts in Computational Social Science**

GEORGE MASON UNIVERSITY | Fairfax, VA | 2016

Bachelor in Economics with honors

UNIVERSITY OF TASMANIA | Hobart TAS, Australia | 1995

Chartered Financial Analyst, CFA Institute, 2012

PUBLICATIONS

Introducing a Multi-Asset Stock Market to Test the Power of Investor Networks (2017).

Journal of Artificial Societies and Social Simulation, 20(4). <https://doi.org/10.18564/jasss.3497>

Market Fluctuations Explained by Dividends and Investor Networks (2017).

Advances in Complex Systems, 1750007. <https://doi.org/10.1142/S0219525917500072>

To Big Wing, or Not to Big Wing, Now an Answer* (2016).

In *Autonomous Agents and Multiagent Systems* (Vol. 10002, pp. 73–89). Cham: Springer International Publishing. https://doi.org/10.1007/978-3-319-46882-2_5*Winner of best paper at the 17th Workshop on Multi-agent-based Simulation**CONFERENCE PRESENTATIONS**

The Search for Living Beta - Utilizing Network Science to Unlock the Secrets of the Stock Market.

2nd Workshop on Statistical Physics of Financial and Economic networks satellite at NetSci2017.

The Impact of Dividends in an Investor Network.

12th Artificial Economics Conference, 2016.