Updated: 29th March 2025

David Goebel

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PROFILE

Quantitative financial professional with 19 years' experience of research and managing multi-asset portfolios. Interest in using systematic methods to mitigate risk and improve returns. Deep knowledge of equity, fixed income and alternative asset classes. Skilled in communicating complex concepts to a wide range of stakeholders and clients.

SKILLS

Access • Bloomberg • BQUANT • Econometric methods • Excel/VBA • Expected returns • Factset • Git • Global Financial Data • LSEG Datastream • Machine Learning • Matlab • Portfolio optimisation • Python • R • Regression models • Risk • SAA • SQL • Systematic strategies • TAA • Time series forecasting

CERTIFICATIONS

CFA INSTITUTE

2015 | CFA Charter

CISI

2009 | CISI Diploma (Chartered FCSI)

EDUCATION

GEORGIA TECH

MS Analytics
Expected graduation 2026
Current GPA 3.8
Data Analytics • Analytics Modeling • Visual Analytics • Machine Learning for Trading • Financial Modeling • Computational Data Analysis

UNIVERSITY OF EXETER

BSc Pure & Applied Mathematics
2006 | 2:1 (Hons)
Calculus • Linear Algebra • Dynamics• Statistics • Computing• Operational Research• Finance

EXPERIENCE

EVELYN PARTNERS/SMITH & WILLIAMSON

Investment Strategist | Associate Director
March 2018 – Present | London

- Cross-asset investment strategist advising ~250 investment managers and £63bn assets from a macro/top-down perspective, presenting to internal and external clients on a daily and weekly basis
- Asset Allocation Committee member specialising in expected returns, risk, quantitative modeling, sectoral equity allocations and fixed income strategy
- Designed new Comparator benchmark process for all clients, a Capital Market Assumptions and portfolio optimisation process as well as factor-based systematic equity sector strategy

SOCIETE GENERALE CORPORATE AND INVESTMENT BANKING

Market Risk Officer | Vice President
Dec 2017 – Mar 2018 (chose redundancy offer) | London

- Supporting the prime brokerage CRO • Enforcing model risk management policy • Liaison with the SG Group model validation and risk teams

KLEINWORT HAMBROS (NÉE BENSON) (SG PRIVATE BANKING)

Quantitative Analyst | Vice President
Dec 2012 – Dec 2017 | London

- Designed, built and maintained systematic investment strategies which exhibit attractive risk-return characteristics, including high-level asset allocation, fixed income, currency and commodity strategies • Established cross asset house views with the CIO and Investment Policy Committee • Quantitative investment-grade bond selection and portfolio construction

SABBATICAL | Travelling

2011 – 2012 | South East Asia & Australasia

CHARLES STANLEY | Investment Manager (CF30)

2008 – 2011 | London

- Promoted in 2008 to client-facing investment-led role in large investment team in London • Member of investment strategy committee providing cross-asset investment ideas with personal expertise in systematic equity selection • Designed and implemented new trading system to move client portfolios closer to our multi-asset models

CHARLES STANLEY | Assistant Portfolio Manager

2007 – 2008 | Exeter

- Provided investment recommendations to managers across asset classes and products • Member of strategic and tactical asset allocation committee

GERRARD INVESTMENT MANAGEMENT | Business Analyst

2006 – 2007 | Exeter

- Designed and implemented solutions for all aspects of the business in Excel/VBA