

# Purnur Agiacai Schneider, CFA, FRM

## *Experienced Financial Analyst*

Core competencies: financial performance & risk - reporting & analytics, market & security research, data analysis, simulating & testing trading strategies, investment operations, accounting, and teaching

## Experience

- May.2022- **A/Associate, Performance & Analytics, BCI, Finance, Operations, Victoria, BC.**  
Apr.2023
  - Investment performance reporting and analysis, using SimCorp Dimension (SCD), Jedox, Power BI
  - Performance attribution and appraisal
  - Daily return versus NAV reconciliation and issue investigations
  - Preparing/assisting key performance indicators and service level agreement reports
  - Ad-hoc performance reporting and analysis
- Nov.2021- **A/Analyst, Public Markets Risk Management, BCI, Investment Strategy&Risk, Victoria, BC.**  
Mar.2022
  - Analysis, research, and reporting on public markets risk exposures
  - Assisting in the formulation of risk recommendations to the asset classes
  - Aid for the design and creation of an investment risk dashboard for BCI Fixed Income pools
- May.2017- **Continuing Education/Homeschooling children/Volunteering, New York, NY & Victoria, BC.**  
Nov.2021
  - Volunteering with CFA Society Victoria - Financial Literacy Committee, for a project aimed to enable smart financial decision-making by building financial literacy within our community.
- Jan.2011- **Senior Financial Analyst, Insch Capital Management SA, Lugano, Switzerland.**  
Apr.2017
  - Coordinated the financial research and analysis of the company
  - Produced all the customized client performance and risk reporting
  - Communicated with clients and prospects regarding investment performance and market views
  - Provided investment support through security research, portfolio analysis, and risk management
  - Back-tested systematic trading strategies through algorithmic simulations
  - Performed fund accounting and NAV reconciliation, calculated introduction fees
  - Raised company visibility by disseminating proprietary market research and promotional materials; managed the company's participation in fairs and conferences; published research articles in finance magazines
- Apr. 2010 **Guest Lecturer in Finance, Toulouse Barcelona Business School, Barcelona, Spain.**
  - Taught two Master's in Finance courses in Portfolio Management and Risk Management
- Jun.2009- **Senior Financial Analyst, "The Lantern" Research SA, Lugano, Switzerland.**  
Dec.2010
  - Helped the Founder/CEO with the startup of "The Lantern" business - initially a financial research company, nowadays a financial events organizer.
- Jun.2007- **Senior Financial Analyst, DL Investment Partners, Zug, Switzerland.**  
Apr.2009
  - Performed Hedge Funds' selection for pension funds through screening, due diligence, qualitative and quantitative analysis
  - Held meetings with investment managers to assess investment suitability
  - Oversaw the FX multi-manager portfolio valuations and risk exposures and performed NAV reconciliation
  - Wrote performance and financial markets commentaries
  - Prepared presentation materials and customized client reporting
- Oct.2005- **Teaching Assistant, University of Neuchâtel, Financial Analysis Institute, Switzerland.**  
Sep.2006
  - Assistance for Master courses in Asset Pricing, Fixed Income Securities, and Financial Mathematics

8-1741 McKenzie Ave, Victoria BC, V8N 1A6

+1 (236) 562 2676 • [purnur.schneider@gmail.com](mailto:purnur.schneider@gmail.com); [purnur.schneider@bci.ca](mailto:purnur.schneider@bci.ca)

<https://purnur-schneider.github.io/>

<https://www.linkedin.com/in/purnuragiacaishneider/>

- Apr.1999- **Economist - Accounting, CNE-INVEST**, Cernavoda, Romania.
- Aug.2001
  - Was responsible for journal entries and accounting in the Social Program chapter
  - Was responsible for splitting/reorganizing old investment-in-progress records for this chapter
  - Verified contractors' invoices, ordered payments and monitored the accounts payable
  - Performed budget reconciliation, reporting, and forecasts
- Nov.1997- **Economist - Accounting, Interbrands Marketing and Distribution**, Constanta, Romania.
- Apr.1999
  - Was responsible for journal entries and reporting of sales operations in the local branch.

## Education

- Feb.2013 **CFA Charterholder, Chartered Financial Analyst Institute, CFA ID 2230490.**
  - Three rigorous exams testing an advanced curriculum of investment management and analysis skills
  - Four years of professional investment experience
  - Commitment to uphold a comprehensive code of ethics
- Apr.2010 **Financial Risk Manager, Global Association of Risk Professionals, GARP ID 113901.**
  - In-depth knowledge testing of the tools for risk measurement and management
  - Two years of work experience in financial risk
- Jul. 2005 **FAME Certificate of Advanced Studies in Finance, University of Lausanne, HEC,** International Center for Financial Assets Management and Engineering.
  - Ph.D. courses in Empirical Asset Pricing, Corporate Finance, Financial Mathematics, Econometrics
  - Awarded the FAME Scholarship
- Oct. 2004 **Master of Science in Economics, University Pompeu Fabra, Barcelona,** Graduate Programme in Economics, Finance, and Management.
  - Awarded European Commission Research&Training Network Grant
  - Graduated with Honours, Accepted into Master of Advanced Studies in Economics program
- Jun. 2003 **Master of Arts in Economics, Central European University, Budapest,** Registered with the Board of Regents of the New York State Education Department.
  - Awarded Open Society Foundation Scholarship
  - Graduated with Merit, Accepted into Ph.D. in Economics program

## Community Engagement and Part-time Projects

- 2021-2022 **Volunteer, CFA Society Victoria**, Financial Literacy project.
- 2009-2016 **Mentor/Grader, Swiss CFA Society**, Global Investment Research Challenge, Lugano.
- 2003-2004 **Research Assistant, University Pompeu Fabra**, Centre de Recerca en Economia Internacional.
- 2001-2003 **Research Assistant, Central European University**, Labor Project, Budapest.

## Languages

English (Expert), French & Italian (Fluent), Spanish (Conversational), Romanian (Native)

## Computer skills

Proficient in operating systems Microsoft Windows and macOS

Proficient in Bloomberg, Factset, Reuters

Expert in Microsoft Office & Excel Data Analytics, competent with Excel Power Query

Proficient with Powerpoint and Keynote, familiar with Latex and Overleaf

Familiar with BCI performance and risk management tools: SCD, PowerBI, Jedox, RM Cube

Basic programming in Python, Matlab, SQL

8-1741 McKenzie Ave, Victoria BC, V8N 1A6

📞 +1 (236) 562 2676 • ✉ [purnur.schneider@gmail.com](mailto:purnur.schneider@gmail.com); [purnur.schneider@bci.ca](mailto:purnur.schneider@bci.ca)

🌐 <https://purnur-schneider.github.io/>

in <https://www.linkedin.com/in/purnuragiacaishneider/>