

# Purnur Agiacai Schneider, CFA, FRM

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

## Experience

Since 2021 **Volunteer with the CFA Society, Victoria, Financial Literacy Project.**

May.2022- **A/Associate, Performance & Analytics, BCI, Finance, Operations, Victoria, BC.**

- Apr.2023 ◦ Investment performance reporting, analysis, and attribution, using SimCorp Dimension, Jedox, Power BI
- Performed daily return versus NAV reconciliation, investigated and resolved discrepancies
- Developed KPI (key performance indicators) and SLA (service level agreement) reports
- Provided ad-hoc performance reporting and analysis

Nov.2021- **A/Analyst, Public Markets Risk Management, BCI, Investment Strategy&Risk, Victoria, BC.**

- Mar.2022 ◦ Performed analysis, research, and reporting on public markets risk exposures
- Assisted in the formulation of risk recommendations to the asset classes
- Contributed to the team-effort to design the investment risk dashboard for the BCI Fixed Income portfolio

2018-2021 **Continuing Education & Homeschooling children in New York, NY.**

Jan.2011- **Senior Financial Analyst, Insch Capital Management SA, Lugano, Switzerland.**

- Apr.2017 ◦ Coordinated the financial research and analysis effort
- Produced all the customized client performance and risk reports and set-up the reporting procedure
- Communicated with clients and prospects regarding investment performance and market outlook
- 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 and 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 such as The Hedge Fund Journal, FX Week, FX Invest, Commodities Now, Profit&Loss, Ticino Management.

Apr.2010 **Guest Lecturer in Finance, Toulouse Barcelona Business School, Barcelona, Spain.**

- Taught two Master in Finance courses in Portfolio Management and Risk Management

Jun.2009- **Senior Financial Analyst, "The Lantern" Research SA, Lugano, Switzerland.**

- Dec.2010 ◦ Assisted the Founder/CEO for "The Lantern" financial events and research start-up

Jun.2007- **Senior Financial Analyst, DL Investment Partners, Zug, Switzerland.**

- Apr.2009 ◦ Performed Hedge Fund selection for pension funds' investments using screening and due diligence
- Assessed RFPs and met with investment managers to evaluate investment suitability
- Monitored multi-manager portfolio valuations and risk exposures and performed NAV reconciliation
- Wrote commentaries on funds and financial markets' performance and outlook
- Prepared presentation materials and customized client reports

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

Apr.1999- **Economist - Accounting, CNE-Invest, Cernavoda, Romania.**

- Aug.2001 ◦ Was responsible for journal entries and accounting in the Social Program chapter
- Split and reorganized the records for the investment-in-progress account for this chapter
- Verified contractors' invoices, monitored the accounts payable and authorized payments
- Was responsible for reporting and automated reports for budget monitoring and forecasting

Nov.1997- **Economist - Accounting, Interbrands Marketing and Distribution, Constanta, Romania.**

- Apr.1999 ◦ Was responsible for journal entries, inventory, and sales reporting in the local branch.

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

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

## Education

- 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

## Professional Certifications

- 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 V.**
- In-depth knowledge testing of the tools for risk measurement and management
  - Two years of work experience in financial risk

## Community Engagement and Part-time Projects

- 2021-present **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  
Expert in Microsoft Office & Excel Data Analytics, competent with Excel Power Query  
Proficient with Powerpoint and Keynote and familiar with Latex and Overleaf text editing  
Familiar with BCI performance and risk management tools: SCD, PowerBI, Jedox, RM Cube  
Competent in Bloomberg, Factset, Reuters  
Basic programming in Python, Matlab, SQL

## Memberships

CFA Society Victoria, Financial Literacy Committee  
CFA Institute and Global Association of Risk Professionals  
Founder of the "Ticino Finance" LinkedIn group (>3,000 members)

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