

Purnur Agiacai Schneider, CFA, FRM

Experienced Financial Analyst

Quantitative Financial Analyst with experience in market research, portfolio analysis, risk management, comprehensive risk and return reporting, trading strategies, fund accounting and reconciliation, tailored client service and reporting, preparing marketing materials, I seek re-entry in the investment industry in Victoria.

- Open work permit
 - Experience in financial operations, financial analysis, accounting, and teaching
 - Strong analytical skills
 - Portfolio and Risk management
 - Performance attribution and reporting
 - Data analysis
 - Basic programming
 - Excellent writing skills
 - Client service and communication
 - Compliance
 - Fund accounting
 - NAV reconciliation
 - Controlling
 - Record-keeping
 - Teaching, training and mentoring
 - Highest ethical standards
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Experience

- May.2017-present **Volunteering/Continuing Education/Homeschooling**, New York, NY, United States.
In Feb.2021, I moved to Victoria, BC, with an Open Work Permit.
- Jan.2011-Apr.2017 **Head of Research/Senior Financial Analyst**, *Insch Capital Management SA*, Lugano, Switzerland.
- Raised client awareness by disseminating proprietary investment and market research
 - Coordinated the financial research and financial analysis of the company
 - Was responsible for all the customized client reporting of performance and risk
 - Provided investment support through research, portfolio construction, and risk management
 - Constructed systematic trading strategies through algorithmic simulations
 - Performed fund accounting and NAV reconciliation
 - Published articles in finance magazines such as FX Week, FX Invest, The Hedge Fund Journal, Commodities Now, Profit&Loss, Financial News, Futures&Options World, Global Money Management
 - Received the *Offshore Excellence Winner of 2014 Award* for the “Swiss Financial Services Research Team of the Year”
- Apr.2010 **Guest Lecturer in Finance**, *Toulouse Barcelona Business School*, Barcelona, Spain.
- Taught two Master's in Finance courses of Portfolio Management and Risk Management
- Jun.2009-Dec.2010 **Senior Financial Analyst**, “*The Lantern*” *Research SA*, Lugano, Switzerland.
- Worked closely with the Founder/CEO for the launch of “The Lantern” startup
 - FinLantern (“The Lantern” Research SA) is now the leader in the organization of events in the financial sector in the canton of Ticino.
- Jun.2007-Apr.2009 **Senior Financial Analyst**, *DL Investment Partners*, Zug, Switzerland.
- Performed Hedge Funds’ selection for pension funds through due diligence, performance/risk analysis, and asset monitoring
 - Held meetings with investment managers to assess investment suitability
 - Conducted quantitative and qualitative analysis of alternative investment products
 - Performed NAV reconciliation
 - Produced presentation materials and customized client reporting
- Oct.2005-Sep.2006 **Teaching Assistant**, *University of Neuchâtel, Financial Analysis Institute*.
- Performed assistantship for Master courses in Asset Pricing, Fixed Income Securities, and Financial Mathematics

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

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

- Apr.1999- **Accountant**, *CNE-INVEST*, Cernavoda, Romania.
- Aug.2001
 - Was responsible for the accounting in the Social Program chapter
 - Reorganized and updated old accounting records in this chapter
 - Performed budget reconciliation and reporting
 - Controlled contractor invoicing and payments
- Nov.1997- **Economist/Accountant**, *Interbrands Marketing and Distribution*, Constanta, Romania.
- Apr.1999
 - Was responsible for the accounting 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 Financial Mathematics, Asset Pricing, Corporate Finance, Econometrics
 - Awarded the FAME Scholarship
- Oct.2004 **Master of Science with Honours in Economics**, *University Pompeu Fabra, Barcelona*, Graduate Programme in Economics, Finance, and Management.
 - Awarded European Commission Research and Training Network Grant
- Jun.2003 **Master of Arts with Merit in Economics**, *Central European University, Budapest*, Registered with the Board of Regents of the New York State Education Department.
 - Awarded Open Society Foundation Scholarship

Community Engagement, Temporary Positions, and Collaborations

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

Languages

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

Computer skills

Proficient with operating systems Microsoft Windows and Mac OSX
Proficient with Microsoft Office and Excel Data Analytics
Proficient with Bloomberg, Factset, Reuters
Programming in Python, Matlab, Excel