

Purnur Agiacai Schneider, CFA, FRM

Experienced Financial Analyst – Open Work Permit

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

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 in Economics, University Pompeu Fabra, Barcelona, Graduate Programme in Economics, Finance, and Management.**
- Awarded European Commission Research and Training Network Grant
 - Graduated with Honours, Accepted into Master of Advanced Studies 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. Economics program

Experience

- May.2017-present **Volunteering/Continuing Education/Homeschooling, New York, NY, United States.**
In Victoria, BC since Feb.21, with an Open Work Permit.
- Jan.2011-Apr.2017 **Head of Research/Senior Financial Analyst, Insch Capital Management SA, Lugano, Switzerland.**
- Raised visibility 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

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

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

- Jun.2009- **Senior Financial Analyst, “The Lantern” Research SA**, Lugano, Switzerland.
- Dec.2010
 - o Worked closely with the Founder/CEO of the startup for the launch of “The Lantern” business.
 - o FinLantern (“The Lantern” Research SA) is now the leader in the organization of financial sector events in Canton Ticino.
- Jun.2007- **Senior Financial Analyst, DL Investment Partners**, Zug, Switzerland.
- Apr.2009
 - o Performed Hedge Funds’ selection for pension funds through due diligence, performance/risk analysis, and monitoring of financial markets
 - o Held meetings with investment managers to assess investment suitability
 - o Conducted quantitative and qualitative analysis of alternative investment products
 - o Performed NAV reconciliation and performance attribution
 - o Produced presentation materials and customized client reporting
- Oct.2005- **Teaching Assistant, University of Neuchâtel, Financial Analysis Institute**, Switzerland.
- Sep.2006
 - o Provided Assistantship for Master courses in Asset Pricing, Fixed Income Securities, and Financial Mathematics
- Apr.1999- **Senior Economist - Accounting, CNE-INVEST**, Cernavoda, Romania.
- Aug.2001
 - o Was responsible for journal entries and budget accounting in the Social Program chapter
 - o Reorganized and updated old accounting records in this chapter
 - o Performed budget reconciliation and reporting
 - o Controlled contractor invoicing and payments
- Nov.1997- **Economist - Accounting, Interbrands Marketing and Distribution**, Constanta, Romania.
- Apr.1999
 - o Was responsible for journal entries and reporting of sales operations in the local branch.

Community Engagement and Part-time Projects

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

Memberships

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

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