Ali Naveed

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Highlights

- Dynamic individual with a bias to action. Always looking for opportunities to learn and develop
- I possess strong organizational skills. My academic focus in Mathematics combined with an innate curiosity drives me to conduct insightful, in-depth research with meaningful analysis. And this helped me deliver quality research work at Scotia McLeod and Amnesty
- Comfortable with manipulating large datasets using Python sub-packages like Pandas, NumPy and SciPy. Took academic courses to understand linearization and basic regression techniques in MatLab. Also proficient with the programming language Lisp
- Experienced in widely used professional data analysis and organizational tools, including Excel and Access in professional environments, including at my Co-op at Scotiabank and internship at Barclays
- Basic experience with web design and development acquired at Scotia McLeod Finance Services where I was tasked to improve and maintain the intranet site used by senior managers, directors and vice presidents of the Global Wealth Management to digitally store quarterly and annual reports
- Community service with Amnesty; currently helping raise funds for Citizen Foundation, one of the largest NGO's in the subcontinent to build schools for orphans and children in disaster afflicted areas
- Intrigued by the stock markets, I experimented with $100 in stocks in September 2015. Seven months later, I now manage a small but growing portfolio (presently ~$5,000) with the help of a professional board of advisors and regular portfolio reporting. The advisors include one of the senior MDs from Bank of America (New York), a hedge fund professional at Claren Road Asset Management (Hong Kong), a M&A advisor at STS Capital (London) and a Private Equity professional (London)
- Multilingual: fluent in English, Urdu / Hindi and Punjabi. Beginner in French

Work Experience

Sep - Dec 2015

Scotiabank, Toronto
Financial Analyst, Scotia McLeod

- Aided with daily reporting procedures including working with Access, drafting reports, as well as training new employees
- Programmed an Excel macro to automate the creation of quarterly Deferred Stock Unit (DSU) awards report for the top 248 wealth advisors. My macro reduced the processing time, including validation checks, from 6 hours to 2 minutes
- Created a VBA program to automate the process of sending encrypted branch budget reports to 250 Scotia McLeod Finance branches. Increased delivery speed by 18x over previous process
- Learned various system applications, including PeopleSoft for basic accounting procedures such as reimbursing wealth advisors. Redesigned and then maintained the Scotia McLeod Finance Services Website used by the Senior Vice Presidents and Directors of the GWM business making it user friendly and broadening the scope of its use

Barclays PLC, Islamabad   **Jun - Jul 2014**
Summer Intern, Corporate Division

- Assisted the regional corporate banking team win one of its largest annual account (USD 1 million) of Halliburton by helping draft a research note on the firm and identify what services it needed most
- Trained and managed a team of interns and junior relationship bankers on the process of verifying the authenticity of registered companies with the Securities and Exchange Commission of Pakistan (SECP)
- Prepared Risk Score Models and Standard Due Diligence reports for 30 corporate accounts. Enhanced efficiency of these models by improving formulae in the spreadsheets: Risk Score Model queries were cut down to less than half of those needed previously

Amnesty Canada, Vancouver   **Jan - Mar 2014**
Student Volunteer, Research Division

- Worked directly under the supervision of British Columbia's Regional Activism Coordinator on a project to address violations by Canada's spy agency, CSEC of privacy rights granted under the Charter of Rights and Freedoms
- Creating public awareness and preparing petitions to present to Canada's MP's to curb future violations and impose legal and constitutional restrictions

Other Experience

Jul - Aug 2013

Opening Day, UBC Vancouver
Volunteer, Human Resource Division

- Chaperoned over 50 newly admitted students and advised them on university related matters
- Recruited and managed a team of 6 students to help chaperone a total of 300 students

SPERO, Islamabad   **Sep 2008 - Sep 2011**
President and Treasurer, First Volunteer Work Organization at Bahria College

- Prepared the memoranda for the principal and faculty, including a mission statement, report on the goals of the organization, and a comprehensive budget based on planned activities and expected donations
- Presented quarterly budget reports to stakeholders: collected ~USD 3,000 from fundraising
- Received the Certificate of Excellence by Pakistan's Chief of Naval Staff for SPERO's activities, specifically for efforts in recruiting and managing 35 volunteers at the Naval Special Children School (NSCS)

Education

University of British Columbia, Vancouver, CA   **2012 - *present***
Majors: Mathematics, *Minor*: Economics
Select Courses: Economics of Technological Change, Mathematical Programming, Probability, Applied Linear Algebra, Number Theory, Micro / Macro Economics, International Banking

Bahria College Islamabad, Pakistan   **2009 - 2011**
GCE A 'Level (340 UCAS Points)

Bahria College Islamabad, Pakistan   **2007 - 2009**
GCSE O 'Level (6 A's, 3B's)

Awards

- Awarded the International Major Entrance Scholarships (IMES) reserved for exceptional international students entering undergraduate programs at UBC
- 'Outstanding Diplomacy Award' at Roots School Model United Nations
- IKC Math Award for finishing in the top 100 students from across 200 schools in the country

Skills and Interests

Portfolio Management:

- Prepared and presented my first 16-page industry investment report to potential advisors from Claren Road, Bank of America and STS Capital to recruit them as my Board of advisors to help me learn about and grow my stock portfolio in 2015
- Currently managing a diversified equities portfolio valued over $5k. Investment strategies are revisited on a bi-weekly basis through a report I circulate with short and long term targets. Strategy is challenged by the Board, but I execute all final investment decisions
- Follow a thorough qualitative and analytical approach to portfolio reporting and investment decision-making. Conduct a holistic analysis of company financial metrics, e.g. EBITDA, earnings, RoE, P/E, etc., and a market and competitive analysis with the help of S&P Capital IQ, NASDAQ

Technical Skills:
- Proficient in Microsoft Office Suite
- Intermediate programming with LISP
- Proficient with Visual Basic for Applications. Programmed several macros at a professional level
- Experienced in Python and related data driven packages such as PANDAS, SCIPY and NUMPY

Other Interests:
- Travel, cricket, hiking, rowing and following current finance and economic affairs