



RATTAPON SRIPHATHOORAT

CFA EXAM LEVEL III PASSER

📍 Bangkok, Thailand (Open to Relocation to Singapore or Hong Kong)

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🌐 Portfolio: <https://shanesri.com/>



PROFESSIONAL SUMMARY

Analytically driven CFA Level III passer transitioning from an engineering and entrepreneurial background to a career in investment management. Seeking a foundational role in Equity Research, Investment Analysis, or Portfolio Management to leverage a combination of skills:

- **Quantitative:** Rigorous analytical and problem-solving skills from a B.Eng. in Aerospace Engineering.
- **Practical Financials:** Hands-on experience in P&L management, budgeting, product costing, and ROI analysis from founding and operating two businesses.
- **Investment Expertise:** Demonstrated mastery of advanced investment concepts, financial modeling, and portfolio construction via the CFA program.

EDUCATION & CERTIFICATIONS

CFA Program — Level III

Passed

- Completed Practical Skills Modules including: Financial Modeling , Portfolio Development and Construction , Python, Data Science & AI , and Python Programming Fundamentals.

Kasetsart University — B.Eng. Aerospace Engineering

2008–2012

KEY SKILLS

- **Financial & Investment Analysis:** Financial Modeling, Portfolio Development & Management, Investment Analysis, Financial Analysis, Equity Valuation, Risk Management.
- **Languages:** Thai (Native), English (Fluent).

PROFESSIONAL EXPERIENCE

Brand Buddy Co., Ltd. — Co-Owner | Head of Media Buying & Operations

Jan 2019 – Nov 2023

- Financial Planning: Co-developed financial plans and budgets for client marketing strategies, managing media spends and operational costs.
- Performance Analysis: Led all campaign data analysis, focusing on ROI optimization and cost-efficiency metrics to inform capital allocation decisions and maximize client profitability.
- Process Improvement: Designed and implemented new data workflows that improved project efficiency and the accuracy of performance reports.

PFP NFT Blockchain Project — Community & Strategic Marketing Lead

Jun 2021 – Aug 2022

- Market & Growth Strategy: Developed the complete go-to-market strategy, using market analytics to build a community from 0 to 10,000+ members.
- Project Execution: Executed high-impact strategic campaigns that resulted in a complete project sell-out within 4 minutes of public launch.

Personal Craft Co., Ltd. — Owner & Operator

Feb 2015 – Apr 2020

- Financial Management: Directed all company financial operations as founder, holding full P&L responsibility and managing daily cash flow.
- Corporate Finance: Developed budgets, created product costing methodologies, and built pricing models to optimize gross and net profitability.
- Operations: Managed the entire D2C business, from CAD-based product design to online commerce and operations.