

PROFILE

- Experienced investment professional with deep capital markets experience
 - Articulate presenter of complex investment ideas to colleagues and key stakeholders
 - Strong relationship builder who enjoys working with others and thrives in team environments
 - Masters in Finance (Boston College), Bachelor of Commerce (University of Alberta)
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WORK EXPERIENCE

SAM HOUSTON STATE UNIVERSITY, May 2014 – Present

Huntsville, TX

Doctoral Research University with 21,000+ enrolled students

Treasurer

- Oversee all banking and investment relationships on behalf of the university to generate attractive risk-adjusted returns
- Monitor all endowment assets and operating funds to ensure performance metrics and compliance parameters are being met
- Actively participate on the university's investment committee to assess managers, verify allocations, and review attribution reports
- Seek and identify new opportunities to generate alpha from endowment and operating assets
- Lead and participate on RFP evaluation teams for bank depository, merchant services, and investment consulting engagements
- Identify opportunities to improve customer service and reduce transactional costs for student payments
- Supervise a total staff of 15 including treasury staff and student financial services
- Review and assess performance of various managers to identify managers that should be allocated additional capital or eliminated from portfolios
- Interact with multiple vendors and sell-side firms to assess macro views and provide feedback to committees
- Collaborate with fundraising teams to answer inquiries and speak to donors regarding market outlook and spending targets
- Produce executive summaries for senior leadership showing investment performance and improvements in operational areas

ENBD ASSET MANAGEMENT, October 2007 – October 2013

Dubai, UAE

One of the largest asset management firms in Dubai

Portfolio Manager, April 2010 – October 2013

- Lead portfolio manager of funds and investment portfolios covering various international markets
- Thorough knowledge of investment markets, with comprehensive exposure to equities, fixed income, credit facilities, foreign exchange, and commodities
- Generated return of +21% during tenure as lead manager of the MENA High Income Fund (MHIF); the fund invested in dividend equities and fixed income to generate returns for investors
- Outperformed the benchmark by +17% while maintaining lower volatility, which identified MHIF as one of the best risk-adjusted funds in its class
- Utilized quantitative analysis and risk management tools to track performance, identify the best ideas for portfolio construction, and implement asset allocation changes in a timely fashion
- Analyzed various managers for a fund-of-funds product and highlighted several recommended funds to the committee for consideration
- Worked with clients to develop successful investment strategies according to each client's investment requirements
- Interacted daily with various financial intermediaries including international brokerage firms, global custodians, regional stock exchanges, and market regulators

- Effective presenter of investment strategies to clients, distribution channels, investment boards, and institutions; known for establishing results-oriented working relationships
- Produced various board level reports showing risk profiles in various market conditions, making key recommendations, and highlighting best practices to board members

Investment Analyst, October 2007 – March 2010

- Covered multiple sectors including telecom, transports, and consumer discretionary
- Evaluated potential equity and fixed income investments for inclusion into portfolios based on analysis of financial statements and fundamental valuation metrics
- Maintained quantitative screens to generate investment ideas within key themes
- Met company management teams to assess the growth drivers for their businesses and evaluate their track record of delivering returns to shareholders

MORGAN STANLEY, January 2006 – September 2007

New York, NY

One of America's largest financial institutions

Director

- Managed several banking and lending products within the firm's banking and strategy group
- Interacted frequently with various internal groups including legal, accounting, marketing, and IT to ensure that client expectations were being exceeded
- Flagship investment product was a program to provide clients with FDIC-insured deposits; by August 2007, the program had grown deposits by 98% in one year
- Modeled revenues and used quantitative analysis to set rates for key banking products based on the outlook for short term rates

BRAIT SPECIALIZED FUNDS, January 2004 – December 2005

Boston, MA

A Boston-based hedge fund that identified long-short opportunities in the US market

Investment Analyst

- Buy side analyst for a Boston-based hedge fund covering long and short opportunities
- Generalist coverage of multiple sectors including technology, healthcare, and manufacturing
- Conducted extensive research, including direct interaction with company executives, independent consultants, and sell-side analysts to establish fundamental views
- Constructed earnings models, quantitative market valuation screens, and research notes, while actively tracking performance of equity ideas

GOVERNMENT OF ALBERTA, April 2002 – August 2002

Edmonton, Canada

Department of Revenue for the provincial government

Revenue Policy Analyst (Summer Position)

- Evaluated various investment alternatives for the government's savings fund, which is a long-term savings fund that generates income to supports government programs
- Responsible for scenario analysis and forecasting of the revenues from the fund under various projections in the future
- Developed policy papers regarding investment objectives of the fund and possible changes to the positioning of the fund

INVESTOPEDIA.COM, August 2001 – April 2002

Edmonton, Canada

A premier online investment education platform

Part-Time Writer

- Authored a series of online educational investment market articles while pursuing undergraduate studies at the University of Alberta
- Topics mainly focused on options trading strategies for equity investors in the US and Canada

EDUCATION

Boston College, Chestnut Hill, Massachusetts

Master of Science in Finance, 2003

Completed extensive graduate courses on finance including portfolio theory and investments

University of Alberta, Edmonton, Alberta

Bachelor of Commerce in Finance with Distinction, 2002

Completed two co-op work terms at the Auditor General of Alberta and Nortel Networks

CERTIFICATIONS & PROFESSIONAL DEVELOPMENT

CFA Investment Management Workshop, **Harvard Business School**, 2012

- One of a select group of sixty five investment professionals that attended the annual financial workshop at the Harvard Business School

CFA Charterholder, **CFA Institute**, 2006

- Completed all requirements and have been a CFA charterholder for over seven years
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SKILLS

- Bloomberg, FactSet, Microsoft Office, and various third-party investment platforms
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ADDITIONAL INFORMATION

- Hobbies include reading, chess, traveling, and soccer
- Authorized to live and work permanently in the US