



CFA Society
United Kingdom



RESEARCH CHALLENGE UK FINAL & CAREERS PANEL

22 MARCH 2017

Venue sponsored by



THOMSON REUTERS



**CFA Society
United Kingdom**

CFA Society of the UK
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RUNNING ORDER

- 17:00 **Introduction**
Nick Bartlett, CFA, Director of Education CFA UK
- 17:05 **Welcome from Thomson Reuters**
Tim Baker, CFA, Global Head of Content Strategy and Innovation
- 17:10 **Reading of the rules**
Janice Dorish, CFA
- 17:15 **Team presentations and Q&A**
- 18:40 **Refreshment break**
- 19:00 **Careers Panel**
James Zimmerman, CFA Fund Manager, Jupiter
Katie Stafford, CFA Client Portfolio Manager, Schroders
Nathaniel Clark, Equity Analyst, M&G
Moderator: Jane Coffey, ASIP Chair, CFA UK Careers Committee
- 20:00 **Announcement of the winners and closing comments**
James Doman, CFA Judging Panel Chair
- 20:15 **Drinks reception**

WITH SPECIAL THANKS TO...

Thomson Reuters

Tim Baker, CFA
Katie Duxbury

G4S

Helen Parris, Director of Investor Relations

CFA Society of the UK

Will Goodhart
Nick Bartlett, CFA
Nicki Morris
Hema Patel
Jessica Fleetwood

Graders

Dr. James Seaton
Janice Dorish, CFA

Judges Panel

Tim Baker, CFA
James Dolman, CFA
Greg Collett, CFA
Orlaith O'Connor, CFA



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ABOUT THE GLOBAL INVESTMENT RESEARCH CHALLENGE UK FINAL

Welcome to the UK Final of the Global Research Challenge, hosted by the CFA Society of the UK. This is the tenth year the UK has hosted a local Challenge, and we are very grateful for the support of all those involved.

A unique opportunity for students worldwide

The Challenge gathers students, investment industry professionals, publicly traded companies and corporate sponsors together locally, regionally and globally for a real world competition.

Not just an exercise

In order to promote best practice in equity research and company analysis, students from business schools across the globe, research, analyse and report on a company from the perspective of independent research analysts. Additionally, all participants are introduced to and adhere to the standard of the CFA Institute Code of Ethics and Standards of Professional Conduct.

How the Challenge works

Local CFA societies host and launch a Research Challenge in conjunction with participating universities. The universities assemble teams of three to five business, economics or finance students who work directly with a company to conduct investment research and prepare a company analysis, with guidance from a faculty advisor and investment industry mentor. Students will typically have the opportunity to attend a presentation and Q&A session with management of the company.

The reports are graded by expert practitioners, with the top-scoring teams invited to the local Challenge Final. The teams' presentations are then evaluated by high-profile panels consisting of heads of research, portfolio managers, and chief investment officers from the world's top firms.

Tonight's winning team will progress to the EMEA regional final, to be held in Prague, Czech Republic on 26-27 April 2017.

In 2016, more than 4,000 students from over 865 universities, and 137 CFA Member Societies in 70 countries took part in the Research Challenge globally.

www.cfainstitute.org/partners/challenge



JUDGING CRITERIA

The four teams of students will present their investor recommendation for G4S – an LSE listed, FTSE 250, global, integrated security company specialising in the delivery of security and related services company - to a panel of expert judges.



They will be evaluated on the following:

› **Argument**

How well the team uses data to effectively support their recommendation

› **Questions**

How well the team responds to the Panel's questions

› **Analysis and Valuation**

The team's quality of analysis and appropriateness of valuation models

› **Team Involvement**

Team member involvement throughout the presentation and Q&A

› **Poise**

How confident and convincing the team is

› **Materials**

The quality of the team's presentation slides

The teams' presentation scores will be combined with the scores already earned on their reports, and the winning team will be announced this evening.

The teams competing this year are:



› **Cranfield School of Management**
Cranfield University, Bedfordshire



› **University of Exeter Business School**
University of Exeter



› **King's College School of Management & Business**
King's College London



UNIVERSITY OF STIRLING

› **Stirling Management School**
University of Stirling

JUDGING PANEL



James Doman, CFA
Independent Equity Research Analyst,
Chair of the judging panel

James is currently an independent research analyst working for both buy-side and sell-side equity research firms on long term and short term contracts covering UK and European equities. In addition, James is also involved in equity research projects placed by corporate clients for the purposes of dispute resolution.

James has worked in UK asset management covering equities for 16 years both as an investment manager and as a senior research analyst responsible for the industrials and financials sectors. James started his career with Jupiter Asset Management in 2000 and has since worked for HSBC Global Asset Management and the Royal Bank of Scotland.

James has a BSc degree from Coventry University and holds the IMC and the CFA qualification, which was received in 2012. James is active in continuing education having attended various educational programmes and university courses.



Greg Collett, CFA
Head of European Custom Solutions, Credit Suisse

Greg studied Mechanical Engineering at Cape Town University and worked in the mining, automotive and steel industries in South Africa before moving to the UK in 1994. He completed a Masters in Organizational Change at Bradford University and worked in insurance before moving into corporate consulting.

Greg Collett is currently a senior Director at Credit Suisse HOLT where he has been for the last 16 years. He is responsible for the Custom Solutions Group, a specialist team which works with fund managers to provide investment process. Greg is a member of the HOLT Management Committee which determines strategy and oversees the governance of HOLT. He is also on the CFROI Framework Committee which considers and approves all changes to the HOLT Model.

Greg is an active member of the CFA UK and is Chairman of the Ambassador Council. Outside interests include motivation, leadership, coaching/mentoring, health and personal fitness.

JUDGING PANEL



Tim Baker, CFA

[Global Head of Content Strategy & Strategic Alliances, Thomson Reuters](#)

Tim is Head of Content Strategy & Strategic Alliances for the Finance and Risk Division of Thomson Reuters. He has worked at Thomson Reuters for four years and is based in the firm's New York office. Prior to Thomson Reuters, Tim worked for 13 years at UBS in a variety of analytical and supervisory positions. Starting out as an Equity Research Analyst covering Latin American companies, he moved on to be the Head of Research for Latin America and then Deputy Head for US Research.

He was a permanent member of the Investment Committee (IC) responsible for vetting equity research and recommendations. Tim also designed the firm's equity rating system. Tim returned to his technology roots to become Global Chief Technology Officer, responsible for the firm's research publishing systems, CRM and Data Platform.

He was also on various boards of small and mid-sized companies on behalf of UBS. Tim was originally trained as an electronics engineer, and designed and built telemetry systems at Rolls-Royce. He transitioned into the treasury department where he was in charge of FX risk management. Tim has an MBA from Bath University and is CFA Charterholder.



Orlaith O'Connor, CFA

[Investment Manager at Guardian Capital](#)

Orlaith currently works on the Global Fundamental Equity team at GuardCap Asset Management where she analyses stocks across sectors. Prior to this she worked mainly as a global healthcare analyst at Martin Currie in Edinburgh.

She received a BA in Economics & Mathematics from the National University of Ireland, Galway and an MPhil in Economics from the University of Cambridge. She is a CFA charterholder.

UK FINALIST 1 – CRANFIELD SCHOOL OF MANAGEMENT, CRANFIELD UNIVERSITY



Cranfield School of Management is one of the oldest business schools in Europe. As part of Cranfield University, it is the UK's only wholly postgraduate university, and aims to make a significant contribution to global innovation, changing the way society thinks, works and learns. They are globally recognised for excellence in leadership development and for industry links and real-world focus.

Cranfield University was founded on an old RAF site as the first postgraduate college of aeronautics. The School of Management grew out of industrial need for management training and was formally established in 1967 (although the Cranfield MBA dates back to 1964). The airfield the University grew up around is still in use.

Key activities for Cranfield School of Management include:

- Leading-edge, collaborative research and consultancy
- Postgraduate degree programmes (MBA, MSc, DBA, PhD)
- Executive development for middle and senior managers
- Customised company programmes

The University's mission is to transform the practice of management around the world by creating and disseminating applied knowledge. They have a clear vision to be a world leading management school for responsible management thinking and practice whilst conducting research that has a real impact on the practice of management around the world.

www.cranfield.ac.uk

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Xiang Ying Zhu (Shine)

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Xiang Ying studied Finance in both mainland China and Taiwan before making the transition to Cranfield University where she currently studies Finance and Management. Growing up and studying in China, Xiang Ying gained a rich variety of work experience across various industry sectors, including internships with Guangdong Development Bank, China Mobile Communication Corporation, China Jiangsu International Trade Groups and Hong Kong Prudential Investment and Assurance Company.

During her time in the UK, Xiang Ying has maintained her drive for broadening and developing her skill set outside the classroom by interning at a start-up technology company IX47 and becoming a Student Ambassador within Cranfield University. Xiang Ying is also an avid learner in other aspects of life, having trained and competed in high-jumping for over 10 years. She also enjoys helping others to learn and has thrived teaching Chinese to foreign speakers. Looking forward, Xiang Ying aims to continue to embrace challenges, to pursue analytical work in the UK and thinking more long-term wishes to utilise her cross-culture background to help foreign-based companies explore Chinese markets.

UK FINALIST 1 – CRANFIELD SCHOOL OF MANAGEMENT, CRANFIELD UNIVERSITY



Yuan-Yi Ou Yang (Dustin)

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Dustin was born and raised in Taipei, Taiwan, and holds a Master of Management Science from National Chiao Tung University and a Bachelor of Public Finance from National Taipei University. He began his career as an auditor at Pricewaterhouse Coopers (PwC), Taiwan. Prior to that he completed internships with Roland Berger and Maxxis Tires during which he gained experience of due diligence and market research. At PwC, he built in-depth knowledge of financial reporting and business process analysis, and executed cross-border IPO and due diligence projects in the USA, China, and the Philippines.

Before joining Cranfield School of Management, he worked at KPMG, Taiwan as a supervising-senior auditor, providing Sarbanes-Oxley (SOX) audit and IPO service for various industry clients. Dustin joined the MSc Finance and Management at Cranfield School Management to expand his knowledge and gain different perspectives from the diverse backgrounds and experiences of his classmates. He plans to pursue a career in investment banking and equity research after graduation.

In his spare time Dustin enjoys travelling, Thai Boxing, and playing baseball. Additionally, he is an expert at credit card bonus, airline mileage and hotel points planning.



Edward Khoo

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Edward graduated from the University of Oregon with a bachelor's degree in Business Administration and Economics. While studying, he completed internships at Mastercard, UBS and Schroders.

Prior to his undergraduate studies, he spent two years in the Singapore Armed Forces as a military policeman. He is a driven and committed individual, and his interests include traveling and eating. He aspires to work in corporate banking in the future.

UK FINALIST 1 – CRANFIELD SCHOOL OF MANAGEMENT, CRANFIELD UNIVERSITY



Nestor Mikhaylivskiy

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Prior to his postgraduate studies in the UK, Nestor was collaborating with Morgan Stanley as an intern within Moody's Analytics. The Ukrainian-born, Costa Rican bred has furthermore worked for a Canadian proprietary trading firm as a working student throughout his undergraduate studies in San José and London.

His interest in emerging markets mainly results from the fact that Nestor was actively involved in his family-owned trading business, hereby connecting business partners from New York with local jewellery distributors from Central and South America.

He is the Social Career Representative of his course and an enthusiast of martial arts and boxing. Nestor's short-term career goals include gaining the technical skills and the practical experience necessary to add value in the Anglo-Saxon asset management sector. Speaking five different languages, his medium-term goals include focusing on emerging markets in South America and Eastern Europe.



Christian Propst

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Educated in Finance and Management in Karlsruhe, Hong Kong, Paris and Cranfield, Christian is a current member of KPMG's Deal Advisory junior development program. The German-born, Detroit bred has successfully completed two internships at KPMG within the Due Diligence and the Valuation Division in Germany. His fascination for cars has brought him to furthermore complete three internships at Daimler. For the German car manufacturer, Christian has worked for the company's car-sharing start-up Car2go in Stuttgart, for its financial services division in Paris and for its regional M&A division in Tokyo.

Surprisingly, a career in finance was not Christian's first professional aspiration. Before pursuing opportunities in finance he considered a career in tennis and was competing on a national level. Although a serious knee injury has stopped him, Christian nevertheless continued his passion through working as a tennis coach for children.

Christian's short-term ambitions include working on M&A deals across Europe. Medium-term plans include to return and work in Asia.

UK FINALIST 2 – CENTRE FOR FINANCE AND INVESTMENT, UNIVERSITY OF EXETER



The Xfi Centre for Finance and Investment is a graduate teaching and research institute within the University of Exeter Business School. The idea of Xfi was inspired by an endowment in 2001 and fully launched with the completion of its dedicated new building in 2005. The Business School now teaches some 950 postgraduate Masters students annually within a total student population of just under 4,000. The Business School is one of only 80 business schools worldwide to have both EQUIS and AMBA accreditations, placing it in the top 1% of business schools globally. The Xfi Centre for Finance and Investment has been a CFA Program Partner throughout this period, during which time the University of Exeter has joined the Russell Group and risen from a Top 30 to a Top 10 ranking institution across all major UK league tables.

Located in one of the most desirable places to live in the country, the University has been a driving force for growth and prosperity in the south-west region. A spectacular £300m modernisation of the campus during 2013-14 anticipated the surge in student demand and provided facilities which means the University of Exeter consistently ranks as one of the top institutions in the UK for student satisfaction.

www.exeter.ac.uk

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Adedeji Ajadi

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Adedeji is a Chevening Scholar, currently studying for an MSc degree in Finance and Investment at the University of Exeter, Devon, UK. Prior to taking a study break, Adedeji had built his career in a variety of roles and industries including auditing, banking, management consulting and executive management.

His last position was as Registrar at Chartered Institute of Stockbrokers, Lagos, Nigeria, an organization he joined in 2010 as Head, Education & Training . While in the banking industry, he pioneered the operations of Ile-Ife branch of Chartered Bank plc, Nigeria in 2003, ultimately leading the branch to win the award of best performing branch in 2004.

Adedeji holds Bachelor's degree in Applied Accounting from Oxford Brookes University, UK and a Master of Science degree in Agricultural Economics from the University of Ibadan, Nigeria.

He is a Fellow of the Institute of Chartered Accountants of Nigeria (ICAN) and an Associate of the Association of Chartered Certified Accountants (ACCA).

Adedeji aspires to study for a PhD in Finance after his MSc course, and apply his knowledge to provide financial advisory services to individuals and corporate organizations globally.

He is passionate about poverty alleviation and wealth creation.

UK FINALIST 2 – CENTRE FOR FINANCE AND INVESTMENT, UNIVERSITY OF EXETER



Tram N Nguyen

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Tram enrolled in the MSc Finance & Management program at Exeter after spending 3 busy seasons at KPMG Vietnam as an audit associate, which she described as mostly involved learning on jobs and travelling to +30 clients' offices in different industries.

Prior to that, she enjoyed the perk of free soft drinks while conducting research on corporate social activities to help improve the market share of Pepsi Cola in Hanoi during her summer internship at Suntory PepsiCo Beverage Vietnam.

Tram would like to become an experienced buy-side M&A advisor in the next three years. Apart from working and studying, she is passionate about taking long walks, landscape photos, and seeking pleasure from good books or movies.



Penny Wang

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Penny undertook a wealth management assistant role at China Galaxy Securities Co. Ltd after finishing her BSc Accounting and Finance degree at the University of Exeter. She has great passion in financial markets, especially in hedge funds and ETFs, and has complemented her interests by pursuing MSc FAFM, a quant-heavy program with advanced mathematical topics.

Before studying in Exeter, Penny had one-year experience studying law. She supported an intellectual property project presented in Waseda University (Japan) by Professor Xinxiang Xu (Southwest JiaoTong University, China). She also has sales consulting experience in China where she negotiated with 52 shops to promote their business plan.

Currently, Penny is the member of Quality Insurance Committee and the Deputy Subject Chair of Accounting and Finance in University of Exeter. She excels in coordinating with different parties to solve technical and organisational difficulties in academia and aims to further improve the University's learning environment. Penny is concerned about the fairness of education in developing countries and human health issues. She taught primary students in GuiZhou Province, China during the summer vacation. She also volunteered for the British Heart Foundation. She believes that a high-standard life is not only concerned with financial wealth but also requires empathy and happiness.

Penny is a keen learner and is passionate about financial markets.

UK FINALIST 2 – CENTRE FOR FINANCE AND INVESTMENT, UNIVERSITY OF EXETER



Czi Xian Lim
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Czi's interest in finance and markets was sparked by losing a wager in a Merseyside match where the loss of her lunch money was offset by a valuable lesson in heuristics and biases.

She graduated on the Dean's List from UCSI University Malaysia in BSc Finance before joining AmBank, a tier-1 Malaysian bank as a wholesale banking associate, where she delivered a set of projects involving supply chain financing and ERP system integration for large corporates.

Previously, she worked as a trade finance analyst at a family-owned commodity trading company. As an undergrad, she interned at HSBC Malaysia, where she worked on risk and control assessments.

Czi's other passions are education and forecasting. In 2015, she was sponsored by the Reischauer Institute of Japanese Studies and Nagano Board of Education to design and deliver a series of seminars on pop culture and philosophy. She has been an active forecaster at the Good Judgement Project® since 2015, focusing in geo-political and financial events in the APAC region.

Czi is currently completing her Masters in Finance and Management, and looks forward to being a corporate banker in industrial finance – although, given the ballooning crowd in the fintech bandwagon, she is also taking coding classes, just in case.



Bristant Tamang Bamjan
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Bristant is currently studying MSc Financial Analysis & Fund Management at the University of Exeter, a program focused on portfolio management and asset allocation strategies. Prior to starting his Masters, he completed his ACCA and worked as a Junior Accountant in Fraser Russell where he completed various auditing and accounting work on behalf of his clients.

During his free time he likes to travel and has made various hiking trips around Kathmandu Valley and has plans to undertake a journey to Annapurna Base Camp this year. He has collaborated with various societies to organise fund-raising events during the Nepal Earthquake crisis which occurred in 2015.

Currently, Bristant is a part of the "FAFM Superfund competition". Along with this, he is working on his side project which is to build a portfolio generating computer program based on the AIM Market. Bristant is passionate about his knowledge built from his masters and wants to pursue a future career in asset management.

UK FINALIST 3 – KING'S BUSINESS SCHOOL, KING'S COLLEGE LONDON



King's Business School is one of the top ten ranked centres for the study of management and business in the UK and students belong to a community of over 100 academic staff and a School that offers a full range of undergraduate, Masters and PhD programmes. King's Business School is a research intensive School which has the benefit of being located in a world-leading, multi-faculty institution.

On 1 August 2017, King's Business School will become a separate King's Faculty, reflecting growth in the range and scale of research and teaching. This will mean a move into new accommodation in Bush House during 2017. From here the School will act as a hub for engagement with business, the City, public sector organisations, government and NGOs.

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Matthew Kaard

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Matthew Kaard holds a double Bachelor's in Finance and Economics from the University of Western Australia, and is currently undertaking his Master's in Banking and Finance at King's College London, with a focus on risk and financial econometrics. While studying for his undergraduate degree, he co-founded a private mutual fund that focused on identifying fundamentally mispriced APAC minerals and resource equities.

He has held internships in derivatives trading and equity research, and has two years experience in strategy for a multinational. During this time, he completed the CFA Level 1 examination, and is looking to complete the Level 2 examination in June 2018. He continues to trade derivatives in his spare time, testing event-driven hypotheses on mispriced implied option volatility.

His dissertation hopes to expand on the empirical analysis of volatility forecasting models in risk estimation, complementing his career ambition of working in risk management.

UK FINALIST 3 – KING'S BUSINESS SCHOOL, KING'S COLLEGE LONDON



Felix Kempf
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Felix holds a Master of Science degree in Civil Engineering from Karlsruhe Institute of Technology (KIT), Germany, where he majored in Structural Engineering, specifically Structural Dynamics as well as Steel and Timber Structures. Mr. Kempf is currently enrolled at King's College London, United Kingdom, as a postgraduate student in Banking and Finance where his studies focus on Financial Econometrics and Corporate Finance.

Felix gained valuable work experience in the field of construction and real estate management as well as private equity. His engineering and finance education allow him to work in highly interdisciplinary and quantitative contexts.

Besides academic achievements Felix was a semi-professional field hockey player. He has played 2nd Bundesliga in Germany, participated in several German championships and won the English National Cup with East Grinstead Hockey Club.

He has been a House and School Prefect at Ardingly College, from which he graduated with the International Baccalaureate, and was Head of Fundraising at Engineers Without Borders Karlsruhe.



Rian Yuntoharjo
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Rian Yuntoharjo holds an accounting degree from Universitas Gadjah Mada, Indonesia, and is currently taking his Master's in Banking and Finance at King's College London. He has been awarded a full scholarship from Indonesia government to continue his study in London.

He was involved in social project to support equality development in Indonesia, where he and his team stayed for 2 months in a remote area of Indonesia with only 4 hours of electricity. The project has become a pilot project for similar development programs in other areas. In the professional life, he was an external auditor at Big 4 accounting firm which the clients were mainly from Palm Oil industry. He received a 5 out of 5 recommendation from his seniors when he was assessed to be a permanent employee. With various exposure from his working experience as an external auditor, he has decided to deepen his knowledge in finance in order to obtain an opportunity to work in finance industry.

His main research interest is on Corporate Finance which is inline with his career target to become an investment banker in the future.

UK FINALIST 3 – KING'S BUSINESS SCHOOL, KING'S COLLEGE LONDON



Irina Dashevskaya

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Irina is currently studying for an MSc in Banking and Finance at King's College London. Her previous education includes a degree in management from a top Russian university.

She is actively researching economics of innovation, aiming for a doctorate. Irina has worked in audit for a Big 4 company, financial management in a major Russian industrial holding company, and as an e-commerce entrepreneur. She aspires to a career in asset management, wealth management or the corporate finance department of an industrial company.

Outside of school, she' has won a number of piano and fencing contests in regional competitions in Russia. Irina is fluent in Russian, English and German.



Konstantin Alekseenko

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Konstantin is enrolled in the MSc Banking & Finance programme at King's College London. In 2015, he graduated with a BSc in Economics from the Lomonosov Moscow State University.

Konstantin's Moscow work experience includes time with The Boston Consulting Group as a Case Support Student as well as a summer position with SouzCapital, working as a financial consultant.

Konstantin has been active in several sports including basketball, swimming and golf. He is fluent in Russian and English.

UK FINALIST 4 – STERLING MANAGEMENT SCHOOL, UNIVERSITY OF STERLING



UNIVERSITY OF STIRLING

The University of Stirling is a beautiful campus university, founded in 1967, that nestles at the foot of the Ochil Hills by the city of Stirling. The MSc in Investment Analysis is a one year taught Master's programme offered by the Accounting and Finance Division of University of Stirling Management School.

Stirling was the first institution in Scotland to achieve Program Partner status and has an unrivalled record in the CFA Institute Research Challenge having reached the UK Final in all but one of the last ten years. The international reputation of the programme attracts students from a wide variety of educational and professional backgrounds and cultures, giving the programme a unique flavour and producing graduates that are highly sought after.

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Adzahemen Stella Vajime

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With parents from both Nigeria and Ghana, Stella identifies herself as being West African. She transferred from the University of Jos to Benue State University (both in Nigeria), where she earned an undergraduate degree in Accounting. She completed a Mini MBA programme at the Lagos Business School, organised by Junior Achievement Nigeria (the Nigerian branch of Junior Achievement Worldwide) also known as the Venture in Management Programme (VIMP 2016).

Stella has experience in accounting and logistics management functions from her work at an IT firm specializing in international trade facilitation. She climbed the ladder from Finance trainee to Accounts Officer over 10 months. When she is able to squeeze out time she trains with the University Women's basketball team, and she is also occasionally to be seen playing table tennis.

Stella is especially keen on harnessing investment opportunities in emerging markets and has an interest in the participation of women in investment decisions.

UK FINALIST 4 – STERLING MANAGEMENT SCHOOL, UNIVERSITY OF STERLING



Awatif Mustafa

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Awatif Mustafa is an enthusiastic individual who aims to be a leading woman in the financial world. Upon completion of her BA in Accounting from Birzeit University in Palestine she worked as a financial officer in Arab Bank, providing financial and consulting services for 4 years.

She is currently studying for the MSc in Investment Analysis as a Karen Napier Scholar and lives the Stirling experience to the maximum. She recently won a trophy from Amplify Trading for being the most enthusiastic student during the University's financial trading boot camp.

When she is not working or studying, she enjoys hiking with friends, boxing stress away, volunteering, and socialising, often with a large cup of coffee.



Marco Negrelli

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After obtaining an undergraduate degree in Economics and Finance at the University of Bologna in Italy, Marco continued his studies at the University of Stirling for the MSc in Investment Analysis. This choice was driven by a desire to acquire further knowledge about the investment industry, with a focus on the buy side, along with the University of Stirling's close links with CFA Institute.

During his studies at Stirling, Marco is also improving his team working skills. His career goal is to achieve a position as an equity research analyst and, in due course, as a portfolio manager in an investment management firm. In his leisure time, Marco enjoys playing the guitar or the drums and spending time with his girlfriend.

UK FINALIST 4 – STERLING MANAGEMENT SCHOOL, UNIVERSITY OF STERLING



Guillaume Gregoire

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Guillaume holds an undergraduate degree and a Masters degree in Business Engineering from Louvain Management School in Belgium. During the first year of his Masters he followed two options (Finance and the Supply Chain) and also studied International Business for four months in the United States at the University of South Carolina. He completed his Masters degree by working for six months at Dow Corning as an Intern in their Procurement Department.

His final dissertation was a case study related to his internship about the purchasing strategy for a specific raw material. After finishing his first Masters degree, Guillaume decided to complete another to gain a specialisation in Finance and improve his English to find a job in the UK, which is one of his main goals.

The main reasons for choosing to study for the MSc in Investment Analysis at the University of Stirling is the reputation of the University and its relationship with the CFA Institute. Beyond his studies, Guillaume has a passion for sports and has been selected to represent the University of Stirling teams in tennis and futsal.



Jakob Siegert

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Jakob holds an undergraduate degree in General Management from the European Management School in Mainz, Germany. After finishing his undergraduate degree Jakob worked for two years as a turnaround consultant, focusing on German mid-size companies with a European scope. The focus of his job was analysing business scenarios for entire companies or single divisions to secure refinancing and enable the companies to continue in business. Jakob started his postgraduate degree at the University of Stirling Management School in September 2016. He chose the University of Stirling because of its close links to the CFA Institute as well as the high reputation of the MSc in Investment Analysis. In his spare time Jakob likes hiking and exploring the Scottish Highlands with his fiancée.

2016/17 PARTICIPANTS

University of Cambridge

Team: Jenny Chen, Zhenyu Huang, Michelle Li, Sunga Lungu, James Talty
Faculty: Simon Taylor
Mentor: Bojana Bidovec, CFA

City University London (CASS)

Team: Rory Blundell, Anna Komarova, Jorge Rios Oliveros, Frederico Trombetta, Haoliang Zhong
Faculty: Natalie Anderson, Dirk Nitzsche
Mentor: Ade Roberts, CFA

Durham University

Team: Cameron Messenger, Valentina Riccardi, Loic Simonet, Patrick Ulrich, Wei Zhou
Faculty: Thomas Renstrom
Mentor: Paul Bethell, CFA

University of Edinburgh

Team: Rami El-Sirgany, Alfonso Pliego, Samir Sedaghat, Wenqian Shen, Hirokazu Suzuki
Faculty: Ronan Gallagher
Mentor: James Cooke, CFA

University of Essex

Team: Mahesh Daswani, Mengxi Li, May Yin Lo, Noyan May, Samuel Wilson
Faculty: Hardy Thomas

Imperial College London

Team: Peer Borsky, Hugh Carrow, Boris Gulevich, Maeva Montagnier, Christian Schmidiger
Faculty: Christopher Corbishley

Lancaster University

Team: Rafael Carmona Belo, Goncalo Fernandes, David Ferrao, Wenjun Gao, Tarcayani Prebagaran
Faculty: Linda Airey

London Business School

Team: Ali Alhaddad, Nodar Daneliya, Yannick Fleig, John Kum, Saphina Siming Zhuge
Faculty: Arthur Kraft and Miles Davies
Mentor: Orlaith O'Connor, CFA

University of Newcastle

Team: Thomas Cullen, Luca Gissi, Bingjie, (Olivia) Huang, Steven Lawrence, Dominic Oulton
Faculty: Thanos Verousis and Sara Maioli
Mentor: Scott Farnetti, CFA

University of Oxford

Team: Jonathan Becker, John Hanson, Pavel Taranin, Maximilian Voigt, Albert Zhang
Faculty: Dr. Peter Eso, Dr. Ken Okamura and Alexander Wright
Mentor: Ewan Markson-Brown, CFA

Robert Gordon University

Team: Niamh Collins, Reinaldo Lopez, Francesc Porras Saldana
Faculty: Farooq Ahmad

University of Southampton

Team: Ching Fung Chan, George Peter Gittus, Pei-Chun Tsai, Sheng-Tai Wu, Yilan Zhu
Faculty: Taufiq Choudhry

University of Warwick

Team: Frederik Brennan, James Daly, Yuting (Hydra) Li, Riccardo Pianta, David Wildgoose
Faculty: Irene Kavallieratos, Alexander Stremme
Mentor: Yannick Mathieu, CFA

PREVIOUS FINALISTS

2015/2016

WINNER:
University of Stirling

FINALISTS:
University of Oxford
Imperial College London
City, University of London

2014/2015

WINNER:
University of Oxford

FINALISTS:
Durham University
University of Stirling
University of Warwick

2013/2014

WINNER:
University of Exeter

FINALISTS:
University of Lancaster
University of Stirling

2012/2013

WINNER:
University of Exeter

FINALISTS:
University of Stirling
CASS Business School

CAREERS ADVICE PANEL



James Zimmerman, CFA
Fund Manager, Jupiter

James Zimmerman, CFA, has been managing the Jupiter UK Smaller Companies Fund since June 2015. Prior to taking on the mandate, James worked for the global fund at Rockefeller and Co. in New York, and spent two years working as an analyst on the Jupiter UK Income Team. James graduated cum laude with a Bachelor of Arts in political science from the University of Pennsylvania



Katie Stafford, CFA
Client Portfolio Manager, QEP Investment Team, Schroders

Katie Stafford is Client Portfolio Manager at Schroders and joined the QEP investment team in 2014. Katie represents the team's capabilities to clients and prospective clients with a focus on the Pan-European region. She works closely with Schroders' regional distribution teams, providing specialist input on the marketing and communication of QEP strategies.

Prior to joining QEP, Katie spent three years in the product management team for the Schroder GAIA hedge fund platform. Her investment career commenced upon joining Schroders in 2010.

Katie has a BSc (Hons) in Economics and Philosophy from Bristol University and she is a CFA charterholder.

CAREERS ADVICE PANEL



Nathaniel Clark
Equity Analyst, M&G Investments

Nathaniel Clark is an Equity Analyst and joined M&G in September 2014 on M&G's rotation graduate scheme, before joining the M&G Select group of long-only equity funds in November 2015 as a dedicated analyst.

Nathaniel graduated from the University of St Andrews with a MA (Hons) in economics.



Moderator:
Jane Coffey, ASIP
Chair, CFA UK careers committee, Executive & Career Coach

Jane Coffey chairs the CFA UK Careers Committee and is now an executive and career coach to investment professionals. Her fund management career started in 1987, when she began investing in European Equities at Provident Mutual and spanned 25 years with many well known asset managers. Between 2002 and 2013 she was Head of Equities at Royal London Asset Management, running £12bn in global equities and managing a team of 15 investment professionals.

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A BENCHMARK.
IT'S OUR
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Caroline Connell, CFA

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