



NICK HURLEY

INVESTMENT MANAGEMENT SPECIALIST
TECHNOLOGY PROJECT MANAGEMENT
FINANCIAL SERVICES | LEADERSHIP



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PROFILE



Proven and experienced portfolio management finance professional with a technical background in engineering and project management. Extremely high level of work commitment and a drive for professional and personal excellence.

Interests in investment decision making, strategic thinking, global affairs. A big passion for people and nurturing strong interpersonal relationships. A love of technology and systems. A desire for continued growth and learning and discovering new things. Devoted to teamwork and a passion for finding creative solutions to problems.

KEY SKILLS



Project Management – led a number of large infrastructure projects for government and government-owned entities.

Portfolio Management – Assistant Portfolio Manager for five years of one of the world's largest convertible funds.

SQL/VBA – Developed a number of bespoke portfolio management and attribution systems for convertible bonds.

Communication and leadership – Communications and leadership coach.

Management – Managed a small start-up business with four employees.

CAREER SUMMARY



Managing Partner,
Executive Agents, Melbourne, Australia
May 2017 - Present

Assistant Portfolio Manager, Global Convertibles and Capital Structure
J.P. Morgan, London, UK
September 2011- September 2016

MSc (Merit)
Imperial College, London
October 2010 – September 2011

Project Manager
Coffey Limited
January 2009 – September 2010

EXPERIENCE



Responsibilities

- Managing all aspects of running a small business, including managing investors, clients, and staff.
- Project managing all clients' cases.
- Face-to-face and phone sales.
- Digital marketing including Google, Facebook, and LinkedIn.

Accomplishments

Building business from just an idea to a profitable business within thirteen months from the start of trading.

Assistant Portfolio Manager, Global Convertibles and Capital Structure
J. P. Morgan Asset Management, London, UK
September 2011- September 2016

Part of a team of four managing over US\$5 billion of assets invested principally in global convertible bonds.

Responsibilities

- Development by scoping, capturing necessary data, and coding of portfolio attribution systems using Monis, VBA, SQL and Excel.
- Development by designing and coding a sell-side broker research storage, aggregation and tagging tool.
- Management of expansion of desk's SQL databases to handle equity, corporate bond and convertible performance and market data.

EDUCATION



Chartered Financial Analyst
2015

Imperial College, London
MSc (Merit) - Engineering, 2011
Intercollegiate Master of Science with Merit in the field of Transport Engineering. Dissertation focussed on developing a quantitative econometric model to determine optimal spatial positioning of high-speed rail stations in the United Kingdom.

Monash University, Australia
BE (Hons), 2008
Bachelor of Engineering with First Class Honours in the field of Civil Engineering. Also completed a minor sequence in physics and major sequence in mathematics. Degree was awarded with two university prizes.

Bairnsdale Secondary College, Australia
VCE, 2003
Victorian Certificate of Education, receiving an ENTER of 94.15. House Captain and Student Council President.



- Reviewing and summarising sell-side, in-house company and technical research to generate investment ideas.
- Leading monthly briefings of Client Portfolio Managers/Product Specialists on the convertible asset class and the funds managed.
- Leading a team of four dedicated technologists in the improvement of desk systems.
- Responsible for analysing indentures to make effective responses to complex convertible corporate actions.
- Meeting with sell-side analysts and CEO's, CFO's and IR from CB issuers.
- Reviewing and providing feedback on literature, presentations and work done by support and client relationship teams.
- Preparation of fund commentary and investment trust board reports.
- Writing asset-class specific research reports and papers.
- Cash management, coding of guideline checks and generating specific investment ideas. Development of investment guidelines for new funds.
- Leading the development of smart and effective ways to analyse volumes of market data in order to help identify attractive investment opportunities. Identifying mispricing in sections of the fixed income, equity and convertible market such as cheapening in US sub-investment grade investment space relative to other regions.

Accomplishments:

- Transformation of OTC pricing data for corporate bonds, CDS and convertibles. Incorporation of quote scraping tool QuoteVision leading to the development of new liquidity monitoring tools.
- Structuring and implementation of a weekly investment strategy meeting and development of a framework for investment strategy both at a macro and asset-class specific level. Reformulation of desk's core/satellite investment strategy, allowing responsible alpha managers to be more targeted in their decision making.
- Implementation and integration of an Economic Value Added (EVA) stock screening and selection tool. Working with pioneers in the EVA field to further refine and improve on applying the technique in the convertible space.
- Refinement of convertible bond valuation model to incorporate better credit risk data, new techniques to incorporate volatility into convertible option pricing model.
- Establishing and leading team communication workshops to discuss communication breakdowns within the team and how to improve team communications.
- Transforming portfolio management systems to incorporate new capital structure investment strategy.
- Fast track promotion to Associate, eligible for VP in 2017.

Project Manager

Coffey Limited, Melbourne, Australia
2009 - 2010

Trusted to undertake investigations including inventory management audits, and offered a series of small capital projects to project manage, delivering them on schedule and within budget. Regularly involved in the management of contractors, communicating directly with numerous stakeholders.

Engineering Intern

Victorian Department of Infrastructure, Melbourne, Australia
2007-2008

Summer intern programme in Infrastructure Projects Division. Assisting the development of business cases for major state infrastructure projects. Tasks included running quantitative demand models and preparing ministerial briefings based on model findings.

ADDITIONAL SKILLS

Market Strategy - Chairing weekly convertible market strategy meetings including the delivery of a combination macro-economic analysis, asset-class specific analysis and portfolio positioning in order to allow well-informed portfolio positioning decisions to be made by the team.

Client Portfolio Management - Preparation of client pitches, investment performance reports and commentary.

Innovation and Development - Development of new analytical tools to screen and identify investment opportunities including the implementation of a quantitative equity screening tool.

Technical - Highly advanced Excel skills, particularly in automation through VBA, interfacing with SQL databases. Highly sophisticated user/coder of SunGard Monis hedge fund management suite. PowerPoint automation. S&P QuoteVision. Development and refinement of Economic Value Added models. Bloomberg Anywhere user for five years including Bloomberg API. IBM SPSS statistical regression including factor and cluster analysis.

Leadership - Leader of J. P. Morgan Pride LGBT diversity business resource group.

PROFESSIONAL MEMBERSHIPS

CFA Institute Melbourne

Golden Key International Honours Society



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