

## **Profile**

25+ years Fixed Income experience in Public and Private Credit Markets with a focus on Credit Research, Strategy and Portfolio Management in a wide range of contexts:

- Expertise in managing Solvency II Insurance portfolios and Open End UCITS regulated funds.
- Experience in setting up and leading Public Credit Research teams and technical expertise in Credit Rating and Risk management frameworks for Private Markets.

## **Work Experience**

### **08/2021- Today: Phoenix Group, London**

#### ***Head of Credit Research/ Senior Credit Analyst (2023 – Now)***

- **Team Leadership, Coordination and Oversight.** Management of a team of Credit Sector research specialists, covering a wide range of Investment Grade Public and Private Credit. Design and implementation of the Public Markets Credit process that involves managing research coverage and ensuring best-in-class credit analysis and strategy.
- **Credit Markets Thought leadership, Strategy and Decision making.** Advice, challenge and guidance to senior management and portfolio and origination teams in relation to new and existing investments. Responsible for top-down analysis and investment strategies for emerging credit risks and recommendation of mitigating actions.
- **Private/Public Markets Financials Research Lead.** Responsible for delivering appropriate Credit Rating and Risk management frameworks for new opportunities in the broad Financials Credit investments Universe. Credit Rating Committee Chair.

#### ***Public Markets Senior Investment Grade Portfolio Manager (2021-2023)***

- **Portfolio Management.** Managing GBP, EUR and USD public markets Investment Grade Credit portfolios (c. £20 billion AUMs). The role involved portfolio construction, security selection, relative value analysis in the context of Solvency II Insurance regulations.
- **Credit Analysis.** Credit Coverage of Financial Institutions and Government Related Entities.
- **Credit Trading.** Delivering Public Markets Credit back-book optimisation and onboarding of new funds through Bulk Purchase Annuities transfers.
- **External portfolio managers oversight and engagement.** Monitoring of external managers with discretionary mandates ensuring that assets are managed according to investment guidelines.

### **03/2019- 07/2021: Pension Insurance Corporation - London**

#### ***Senior Credit Analyst/ Deputy Head of Credit Research***

- **Deputy Head of Credit Research and Lead Credit Analyst on Financials and Government Related Entities (GREs).** Credit investments selection, Trade ideas and Portfolio oversight. Specialisation in Bank and Non-Bank Financial institutions and Government Related Entities (GREs).
- **External portfolio managers Selection and Oversight.** Due diligence of credit assessment processes and regular monitoring of external managers.
- **Private Credit Financials and GREs Lead.** Development of Credit Ratings Methodologies, Rating Assessments and Credit Surveyance. Thought Leadership in Housing Associations, Local Authorities and Investment Trusts.

**08/2010-03/2019: Lloyds Banking Group- London**

***Senior Credit Strategist/ Desk Analyst***

- **Macro Credit Strategy and Research of £ Investment Grade Sectors.** Publication of credit strategy, thematic analysis and investment recommendations. Expertise in Housing Associations (HAs) Local Authorities, Universities.
- **Bank Desk Credit Analysis.** Fundamental, Regulatory and Capital Structure analysis of approx. 40 UK, Eurozone, Swiss and US banks with bond issuance outstanding.
- **Marketing and Coaching.** Extensive interaction with UK investors, providing sector updates and thematic recommendations. Coaching, coordinating and educating a small team of analysts assisting with RV, fundamental and regulatory analysis.

**10/2007-06/2010: Taylor Young Investment Management- London**

***Head of Fixed Income/ Fund Manager***

- Head of Fixed Income (04/2009- 06/2010) Fixed Income portfolio construction and management and selection of 3<sup>rd</sup> party Fixed Income/Hedge Funds.
- Secondment from Alpha Trust (10/2007- 03/2009).

**08/2000-09/2007: Alpha Trust- Athens**

***Senior Fund Manager***

- **Fund management of 4 Fixed Income and Money Market open end funds rated by MorningStar®:** The Alpha Trust Strategic Bond Fund was awarded 5 stars (30/06/07) in the Euro Diversified Bond category and invested in Financials and Corporates across the capital structure (High Grade, Crossover and High Yield) and in EMK Local and Hard Currency issues.
- Member of Board, Alpha Trust Mutual Fund Management Company.

**01/1996-07/2000: BNP Paribas- London**

***Credit and Bonds Quantitative Strategist***

- **Bonds Quantitative Credit Strategy (1999-2000)** Identification of relative value opportunities in the newly created EUR Credit Market and generic and specific trade recommendations.
- **Bonds Quantitative Research (1997-1999)** Design and implementation of analytical tools for the Emerging Markets Desk and for the Government Proprietary Desk.
- **Bond Strategy and Analytics (1996-1997)** Development of the Paribas Asset Allocation (Portfolio Optimisation) Model and the ECU theoretical Indices.

**Academic Qualifications**

- **MBA awarded with Distinction. Imperial College, London University, Management School (1994-1995)**
- **BSc Electrical and Computer Engineering. National Technical University of Athens (1988 – 1994)**

**Professional Qualifications**

- **CFA Charterholder**