

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 3rd 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