

Alexander APOSTOLOV

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CAREER PROFILE:

- Senior Investment Professional, Certified Investment Advisor and Investment Dealer (FSC Certificates), with progressive BG and international experience in the Treasury and Investment Banking industry.
- Relevant Academic Background - Ph.D. in economics and MBA, with related professional training, postgraduate degree, and specialization.
- Extensive experience with Treasury products and international capital market instruments such as Equities, ETFs, ETNs, Structured Derivatives, FX, Fixed income, etc.
- Key areas of expertise include Brokerage and related activities, Fund portfolio management, equity operations, risk management & control, financial planning and modeling, policy implementation, etc.
- Legal framework for investment policy regulation - in-depth knowledge and understanding of finance, economy, legal framework regulations, IFRS standards and related directives.
- Proven experience in linking the corporate vision to achieving desired outcomes through people empowerment and the efficient use of resources, processes, and technologies.

PROFESSIONAL EXPERIENCE:

- **Chief Market Analyst @ BlueSuisse Wealth Management**
Portfolio Management & Analysis Department
📅 2016.Oct. – now, Switzerland/Sweden/Cyprus/Bulgaria
Main responsibilities ▶ Responsible for managing the Portfolio & Analysis team, prioritizing the development of various types of financial models, global market strategy for providing independent and objective advice on critical aspects of raising capital for clients. A proactive role in business development strategies, merger and acquisition policies, etc.
- **Fund Portfolio Manager @ Asset Management “UG Market Fund Management”**
Portfolio Management Department
📅 2018.March – 2019.Sept., Bulgaria
Main responsibilities ▶ Managing funds on a daily basis through fund design, risk management, trade idea generation, and stock analysis for all the company’s mutual funds. Creation of an investment strategy and trade execution plan using Common and Preferred Stocks, ETFs & Fixed Income. Development of PR strategies, etc.
- **Director, Investment Brokerage, member of management board @ Investment Intermediary “EVER” (part of Trading212.com)**
📅 2017.September – 2019.May, Bulgaria
Main responsibilities ▶ A proactive role in the company’s expansion, merger, and acquisition policies & strategies. Reports to the Financial Supervision Commission.
- **Senior Equity Broker @ RaiffeisenBANK (Bulgaria)**
Treasury & Capital Markets Department (Equity, ETF & Option Desk)
📅 2009.Dec – 2014.May, Bulgaria
Main responsibilities ▶ Management of investment transactions negotiated and executed across multiple exchanges (more than 90 global exchanges) covering all traded financial instruments, such as Stocks, ETFs, ETNs, Options, Fixed Income, Derivatives, plus all related activities including capital structure advisory, IPOs, SPOs, tender offers, private equity, and venture capital financing, bookkeeping, implementation of financial and banking policies, etc.
- **Financial Advisor @ Investment Intermediary “Karoll”**
Equities & Mutual Funds Desk
📅 2007.June – 2009.March, Bulgaria
Main responsibilities ▶ Provide investment services on BSE, international markets, mutual funds, financial statement analysis, corporate reporting, earnings reporting, rotations, registrar (inheritance, gift), etc.
- **Senior Dealer International Markets @ Investment Intermediary “Varchev Finance”.**
FX Sales Department (Forex & CFD’s Desk)
📅 2006.Feb – 2007.June, Bulgaria
Main responsibilities ▶ Management of Forex & CFD’s Desk. Client asset allocation recommendations, ongoing implementation and management of client investment portfolios, and ad-hoc research, etc.
- **Investment Banker (internship) @ HSBC Bank - New Jersey Branch**
Investment Banking Department
📅 2003.Sep – 2005.Aug, USA, NJ
Main responsibilities ▶ In-depth knowledge of quantitative analysis, cost-benefit models, and risk mitigation strategies. Experience in financial modeling, forecasting, complex analysis, payroll, taxes, general ledger, and review to create prediction models.

FSC CERTIFICATES:

Professional certificates from Financial Supervision Commission - Bulgaria

- Investment Advisor
- Stockbroker

FINANCIAL SOFTWARE & Technology proficiencies:

High level of technological knowledge and use of specialized financial software such as:

- Bloomberg Terminal, Reuters Eikon, XETRA, eSignal, Comans Broker, Clavis Broker, Clavis Asset Management, Takion, Fusion, Sterling, MT4&5, etc.

Efficiently work with any office software package.

EDUCATION:

UNIVERSITY EDUCATION:

- **(BSc) · Bachelor's degree in Business, Industrial Management, Marketing and Related Support Services-** from VFU.
- **(MSc) · Master's degree in Banking & Corporate Finance** from the University of Economics - Varna.
- **(MBA) · Master's degree in Business Administration** from Lund University - Sweden.
- **(Ph.D.) · Doctoral degree in Economics**, Direction of the dissertation: Finance, Investments & Capital Markets, Section: Macroeconomics, **Scientific direction: "Finance, money circulation, credit and insurance"** from Economic Research Institute at the BAS.

PROFESSIONAL RELATED TRAINING, POSTGRADUATE DEGREE AND SPECIALIZATION:

- **Fixed Income portfolio solutions** - analytics, risk, optimizer & scenario testing. [Bloomberg course](#)
- **Derivatives** - tools for risk monitoring and valuation. [Bloomberg course](#)
- **Solutions for EMIR/MiFID II.** [Bloomberg course](#)
- **IFRS standard.** [Bloomberg course](#)
- **Financial Engineering & Risk Management** (Part I & II). [Columbia University course](#)
- **Credit analysis.** [International Banking Institute](#)
- **Corporate and bank accounting.** [Institute of Financial Services – London](#)
- **Financial analysis.** [Institute of Financial Services – London](#)
- **Investment Banking** - Post-graduate internship. [HSBC Bank – USA, sponsor C.E.N.E.T.](#)
- **Technical analysis of the Capital Markets.** [International University College \(University of Portsmouth\)](#)
- **Methodology of scientific research.** [Economic Research Institute at BAS course](#)

PROFESSIONAL RELATED ACTIVITIES:

- **Member of the Investment, Legal, and Marketing committee** of the [Bulgarian Association of Asset Management Companies](#).
- **Academic researcher and lecturer**, author of numerous research papers, studies and publications with scientific direction in finance, investments & capital markets. [Economic Research Institute at the BAS](#).
- **Participation in several regulatory or legal advisory projects on investment policy issues** related to BG & International financial institutions, with connection to the Bulgarian Financial Supervisory Commission (FSC), FINRA, SEC, MiFID II/ESMA implementation, financial and banking policies, etc.
- **Participation in numerous corporate public relations campaigns**, such as participation in various TV shows, lecturer at seminars, publications in various financial media, etc.
- etc.

PERSONAL SKILLS & STRENGTHS:

THINKING OUTSIDE THE BOX, FLEXIBLE, GOAL ORIENTED



ANALYTICAL & PROBLEM-SOLVING SKILLS



TIME MANAGEMENT, STRATEGIC PLANNING, SELF-DIRECTED



DATA ANALYSIS, RESEARCH, WRITING and REPORTING SKILLS



EFFECTIVE COMMUNICATOR, COLLABORATION, EMOTION MANAGEMENT SKILLS



STRONG WORK ETHIC, ACCURACY & INITIATIVE



REFERENCES:

Available upon request.