

Robert J Mahan

Personal Details:

- **Email:** *Contact for Details*
- **Nationality:** British
- **Telephone:** *Contact for Details*

Education:

- **1998-2001, Oxford University, Lady Margaret Hall :**
2:1 Economics and Politics
- **1996 to 1998, Prior Pursglove College, Guisborough 4 A-Levels:**
History (A), Physics (A)
Pure & Applied Mathematics (B), Economics (B)
- **1991 to 1996, Laurence Jackson School, Guisborough**
GCSE 4 x A*, 4 x A, 1 C

Professional qualifications

- **June 2007:** CFA (Chartered Financial Analyst Qualification) Level one pass (first attempt)
- **February 2006:** IMC – Investment Management Certificate – February 2006 passed first time, Topics covered include:
 - UK regulation
 - Financial instruments
 - Taxation

Work / Investing Experience:

- **June 2008 – Present** Investment on own account.
 - Have invested since 2001 on and off due to limitations imposed by employers, developed understanding of gearing, multiples, yield, business strategy and other drivers.
 - CAGR of approximately 22% since May 2008 increasing my initial investment more than five fold.
 - I look at company balance sheets, cash flow and industry trends to identify successful investment opportunities.
 - Capitalisation ranging from microcap to large-cap.
 - Generally value based investment style but I will look at anything – one correspondent described me as “a cross between Jesse Livermore and Warren Buffett”
 - Blog at: www.deepvalueinvestments.wordpress.com
- **June 2012 – Present** Planning Analyst (0.5 FTE), Sheffield Hallam University, UK
 - Responsible for development and accuracy of university’s student planning process.
 - Responsible for verification of returns to central government.
- **January 2013 – June 2013** Associate Lecturer, Fund Management, Sheffield Hallam University, UK
 - Taught on Fund Management module.
 - Module received best student feedback on the course.
- **August 2011 – March 2012** Trainee Investment Manager, Brewin Dolphin, Teesside, UK
 - Responsible for administration and management of client accounts.
- **June 2008 – July 2011** Information Analysis Administrator, Teesside University, Middlesbrough, UK
 - Responsible for producing data for submission to funding bodies and for internal use.
 - Granted voluntary severance.

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Work Experience:

- **September 2006 – May 2008** Investment Associate (European and Emerging European Telecoms / European Utilities), Putnam Investments London.
 - Built complete financial models of companies (DCF's).
 - Monitored stock news and performance.
 - Analysed company accounts.
 - Built comparison sheets to rank stocks. Use of Bloomberg.
 - Developing a view on companies and rankings between them.
 - Finding out market views through discussion with sell-side analysts, investor relations and company managements.
 - Presented investment ideas to portfolio managers / senior analysts.
- **June 2005 – September 2006** Quantitative Analyst, Skandia Investment Research, Southampton
 - Quantitative Analysis for fund of funds. Focussed on multi-asset, alternative and property asset classes.
 - Made material impact to fund and firm performance.
 - Performance analysis – quartile rank, relative performance, reconciliation as well as risk adjusted measures of return.
 - Performance attribution – analysing the generators of performance within a portfolio.
 - Portfolio monitoring – analysed the composition of funds vs benchmarks and permitted investments.
- **February 2005 – May 2005** Graduate Trainee Futures Trader Futex Ltd. Learnt how to use Bloomberg, TT, CQG and to trade the markets using the firm's capital. Learnt how to respond, research and analyse news and economic announcements. Learnt chart analysis techniques. I left as I was self employed and believed profit unlikely.
- **January 2004 – December 2004** Economics Teacher Shandong Agricultural University, Tai'an, China. I taught Economics to Masters students. This included teaching mathematical models. I greatly improved my presentational skills.
- **May 2002 – Dec 2003** Rizhao Vocational and Technology College, Shandong China. Taught English to students aged over 18.

Skills :

- Basic conversational level Mandarin Chinese
- Competent French
- Basic Spanish
- Touch typing (about 80wpm)
- High level of computer literacy
- Advanced Excel (including VBA / Macros)
- Good Bloomberg skills
- Advanced Access / SQL
- Powerpoint