

Giovanni Stephens

DipGrad InfoSci – Software Engineering
PGDipCom – Finance
BCom – Finance

Contact Info

Phone

+64 (0) 21 026 799 30

E-mail

Stephens.giovanni@gmail.com

LinkedIn

<https://www.linkedin.com/in/giovanni-stephens/>

GitHub

<https://github.com/GiovanniStephens>

Key Skills

- Private funding and investments analysis
- Exposure to NZ venture capital and private equity
- Experience with impact funding
- System development
- General business strategy and development
- People and relationship building

Familiar Tooling

- Generative AI tools such as GitHub Copilot, ChatGPT, Midjourney
- Advanced Excel and VBA
- MS Office Suite
- Relational Dbs (MS SQL, Azure, Oracle SQL, MySQL, Postgres)
- Development tools (e.g., Python, SQL, Git)
- Programming languages: Java, Python, C++

Personality

- I am an extraverted and outgoing kind of person. I really enjoy making new acquaintances and learning from and about others.
- Though finance and data are my strength, I fundamentally thrive when working with people at the heart.
- I am also very curious by nature and love to learn new skills.

Languages

- Fluent English
- Fluent Spanish
- Conversational Portuguese

Hey there!

I'm all about sparking innovation and giving back to my community. With experience spanning various funding, finance, and data analysis roles, I bring a wealth of practical know-how to the table. Coupled with a degree in InfoSci specialising in Software Engineering and postgraduate education in Finance, I've got a solid mix of tech smarts and financial savvy. Whether it's crunching numbers or diving into data analysis, I'm in my element. Raised in a missionary family, I've always had a heart for making a positive impact, and now I'm eager to channel that passion into Queenstown's startup scene.

Throughout my journey, I've had the chance to participate in wide range of roles and activities. I have gone from creating my own startups and having involvement with business competitions to working in private equity and venture capital. I've honed my skills in funding and investments analysis, impact measurement, and system development as well. But it's not just about the numbers for me - it's about the people. I thrive on building relationships and collaborating with others to drive meaningful change.

Outside of work, you'll find me whipping up delicious meals for friends or soaking in the stunning scenery around Queenstown. I believe in finding joy in both my professional and personal life, and I'm always up for new adventures and experiences. I am here to make a difference!

Work Experience

- | | |
|-----------|--|
| Current | Machine Learning Adviser
<i>Queenstown Resort College (QRC)</i> <ul style="list-style-type: none">• Providing course advisory for new data and machine learning course development.• Giving tech talks on machine learning and AI.• Running info sessions and supporting prospective students.• Creating online machine learning and data science content to boost online interest and prospects. |
| Mar 2024 | Trading Manager
<i>Liger Trading NZ</i> <ul style="list-style-type: none">• Used Python to conduct data-driven research, analyzing large datasets to identify and evaluate potential trading systematic strategies.• Applied machine learning to model and anticipate market events, optimising trading strategies.• Coded custom support tools to streamline pricing operations and automate desk processes, optimizing efficiency and accuracy in daily trading activities within the quant and HFT domain.• Conducted granular trade research at millisecond intervals, improving trading performance. |
| 2021-2022 | PE/VC Investment Analyst (Impact funding)
<i>Purpose Capital Impact Fund</i> <ul style="list-style-type: none">• Interact with dozens of people and ventures focused on helping the community and world.• Focused on understanding and evaluating where our funds would have most positive impact.• Provided analysis and research using tools such as Power BI, advanced Excel modeling, and Python.• I was the lead in researching 'impact' measurement and management KPIs to help increase positive impact in NZ.• I was the go-to financial modeler, valuations analyst, and portfolio risk and performance analyst.• I validated and checked the senior's financial models and helped to add some rigour to the modeling.• I conducted market research and forecasted commercial and market trends using econometric tools.• I provided strategy and business direction recommendations for early-stage and growth ventures. |

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Technical Skills

Python (8 yrs)

Experienced

Relational DBs, SQL (8 yrs)

Experienced

Excel, VBA (9 yrs)

Experienced

Algorithms, Statistics, ML / AI (7 yrs)

Advanced

Vizualisation (Power BI) (3 yrs)

Advanced

Software dev, testing, CI/CD (7 yrs)

Intermediate

Soft Skills

Communication

Advanced

Time management

Expert

Adaptability / Flexibility

Expert

Teaching / Instructing

Expert

Work Experience (cont'd)

2020-2021

Data Anlyst

TrustPower / Mercury

- My primary role was to **create intuitive reports and analyses** for business units all around Trustpower.
- My primary visualisation tool was **Power BI** for reporting and supporting teams around the business to improve their data insights.
- **Wrangled data** and did **data modeling** using **SQL** and multiple different databases including **Snowflake**, **Azure SQL DB**, **MS SQL Server**, and **Oracle** relational dbs.
- For more advanced analyses, I was able to use advanced **analytics** and **Machine Learning in Python**.
- I communicated with **multiple stakeholders** to deliver tools and analyses to help them understand their processes and data better.
- Some of the role was to help automate data processes and operations using RPA, dbt, SQL, among other tools.

2019

Institutional Administrator (Back Office)

Forsyth Barr

- I **automated ~4 hours of daily work**. My goal was to automate myself out of a role and keep upskilling.
- I was in charge of institutional trades settlements and **supervising the more junior members** of the team.
- I was responsible for **resolving issues and discrepancies** involving other large counterparties like JP Morgan, BNP Paribas, among others.
- I also conducted **financial analyses** and **modeling** for cash flow management reporting directly to the CFO.

Fixed Interest Administrator (Back Office)

Forsyth Barr

- I was responsible for all fixed interest trade settlements.
- In this role, I **automated ~4-5 hours of daily work**.
- I was so successful that I was promoted to institutional within 3 months.
- I was responsible for **resolving issues and discrepancies** sometimes involving other counterparties.
- I was involved in some of NZ's largest bond issuances.

Other Work Experience

2018

Project Administrator

Aurora Energy

- Created various data entry tools and portals for contractors.
- Provided reporting to board level.

2017

Loans and Insurance Coordinator

Roost Mortgage Brokers

- Coordinated the loans team.
- Provided information to clients.
- Created financial calculators to facilitate business operations.

2015

Business Analyst

LED Lights Australasia

- Created the financial plan and projections.
- Ran NPV and IRR analyses.

2014-2019

Finance and Statistics Educator

University of Otago / UniTutor / Privately

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Other Skills

Investment analysis (5 yrs)

Experienced

Portfolio analysis (5 yrs)

Experienced

Stakeholder management (10 yrs)

Expert

Learning

Expert

Teamwork

Expert

Presentations, reporting, writing

Advanced

General business / finance accumen

Advanced

Automation (5 yrs)

Intermediate

References

References available on request.

Education

2021-2022

Massey University

Graduate Diploma in Information Sciences (DipGradInfoSci)

Endorsed in Software Engineering

Key learning areas:

- Algorithms and data structures,
- Machine learning,
- Data modeling,
- Software engineering tools and practices,
- Agile project management,
- Web development and cloud computing,
- Parallel computing and concurrency.

2016

University of Otago

Postgraduate Diploma of Commerce (PGDipCom)

Key learning areas:

- Risk management using methods such as simulation, stress-testing, and VaR,
- Advanced International Financial Management, Advanced Corporate Finance,
- Studies in Capital Markets,
- Financial Engineering (Mathematical finance in relation to financial derivatives pricing),
- Advanced Econometrics.

2013-2015

Bachelor of Commerce (Bcom)

Key learning areas:

- Financial derivatives,
- Financial econometrics,
- Equity valuation,
- Investment Analysis and Portfolio Management, Quantitative financial and business methods, Programming (Java, C, and Python),
- Financial mathematics,
- Basic probability theory,
- Multivariate statistics,
- General statistics.

Additional Startup Experience

- Co-founded a kombucha beverage company in Dunedin in 2018, which ultimately did not progress due to poor margins.
- Co-founded a cryptocurrency broker in 2018, which did not progress due to regulatory challenges.
- Chosen to compete in business case competitions at Otago University. I was sent to Spain in 2016 to compete, winning several stages in the competition.
- Ran full financials for LED Lights Australasia, winning the 2015 Audacious competition with best business plan.

Side Projects

- *Fully-Automated Trading System*
Fully automated trading system for quantitative, systematic trading of my personal account. I use custom-built dashboards, backtests, databases, and cloud computing.
- *Economic Policy Statement Analysis using NLP*
Using NLP and quant models to create a trading algo that reacts to economic statement releases.
- *Cardinality-Constrained Portfolio Optimisation*
Evolutionary algorithm for data mining a high performant portfolio combined with mean-variance portfolio optimisation.