

Daniel Grioli

Melbourne, Australia

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Senior investment professional with over 10 years' experience and an excellent track record in managing institutional multi-asset and equity portfolios.

EMPLOYMENT

- | | |
|--------------|---|
| 2017-present | <p>Grioli & Co.
Melbourne, Victoria</p> <ul style="list-style-type: none">• Founder <p>Bespoke, multi-asset research focusing on strategic and tactical asset allocation for fund managers, pension funds and wealth managers.</p> <p>Assisting fund managers in the design, implementation, client education and marketing of multi-asset, equity, fixed income and liquid alternatives strategies.</p> <p>Helping clients to gain greater control over their future by providing strategic investment advice using a framework approach and investment management (independently managed accounts).</p> |
| 2012-2017 | <p>Labour Union Cooperative Retirement Fund (LUCRF Super)
Melbourne, Victoria</p> <ul style="list-style-type: none">• Portfolio Manager• Acting Head of Investments• Senior Investment Analyst <p>Strategic and dynamic asset allocation, multi-manger portfolio construction and fund manager research.</p> <p>Responsible for management of the fund's \$5.5b investment portfolio and leading a team of 6 analysts and investment operations staff (as Acting Head of Investments).</p> |
| 2012 | <p>Independent Consultant
Sydney, New South Wales</p> <ul style="list-style-type: none">• Principal <p>Consultant to Superannuation Funds, Fund Managers, Hedge Funds and Retail Distribution.</p> <p>Investment Writer.</p> |
| 2011-2012 | <p>FuturePlus Financial Services
Sydney, New South Wales</p> <ul style="list-style-type: none">• Investment Analyst <p>Strategic and dynamic asset allocation, multi-manger portfolio construction and fund manager research.</p> |
| 2008-2011 | <p>AUSCOAL Super (now Mine Wealth and Wellbeing)
Newcastle/Sydney, New South Wales</p> <ul style="list-style-type: none">• Investment Analyst |

Strategic and dynamic asset allocation, multi-manger portfolio construction and fund manager research.

2007-2008

Deutsche Bank AG
London, United Kingdom

- Valuation Analyst

Valuation of structured equity derivatives and hedge fund-of-fund products.

2004-2007

ANZ Banking Group Ltd
Perth, Western Australia

- FX Manager
- Bank Officer, Mortgages and Settlements

Spot FX sales and FX hedging strategies for business banking clients.

Preparation of lending security documentation (e.g. mortgages).

2003-2004

Westpac Banking Group Ltd
Melbourne, Victoria

- Bank Officer, Business Securities

Preparation of lending security documentation (e.g. mortgages, fixed and floating charges, crop liens, etc.).

EDUCATION

Postgraduate

FINSIA/Kaplan Professional

Master of Applied Finance

Major in Investment Management & Wealth Management

Investment Management Consultants
Association (IMCA)

Certified Investment Management Analyst (CIMA)

Undergraduate

Royal Melbourne Institute of Technology

Bachelor of Business

Major in Financial Planning

University of Melbourne

Bachelor of Science (did not finish)

Major in Psychology

Executive

London School of Economics

Behavioural Economics and the Modern Economy

Columbia University Graduate School of
Business

Value Investing

Diploma

FINSIA/Kaplan Professional

Diploma of Financial Markets

Australian Financial Markets Association
(AFMA)

Diploma of Financial Markets

Specialising in Foreign Exchange

Current Studies

University of Melbourne

Graduate Diploma of Psychology

CFA Institute

Chartered Financial Analyst

MEMBERSHIPS

Investment Management Consultants Association (IMCA)