



# Claudia Wellman

## Profile

Motivated **Mathematics Graduate** with a year of experience in finance at a reputable company, looking to utilise my analytical skills and interest in finance as an investment analyst. Presently pursuing a trainee investment analyst program as well as a CPD Investment Risk & Taxation qualification. Dedicated to providing data-based insights and strategic investment decision-making. Enthusiastic about leveraging my quantitative background to excel in the dynamic domain of trading.

## Employment History

### Trainee Investment Analyst , Quill Capital Partners , Remote

JULY 2023 – PRESENT

Currently undertaking a comprehensive investment analysis course encompassing the following key areas in finance.

- Developing a deep understanding of investment and financing distinctions, direct and indirect investments, and identifying suitable investment vehicles.
- Gaining insights into the investment management process, financial market dynamics, and analyzing risk, return, and investment income. Proficient in calculating investment risk variance and its relationship to return.
- Acquiring skills in stock performance analysis, informed decision-making using the Capital Asset Pricing Model, and conducting fundamental financial statement analysis and stock valuation. Formulating stock portfolios and implementing effective investment strategies.
- Evaluating balance sheets, cash flow statements, and various risk types for optimal investment outcomes. Prepared to excel in the field of investment analysis with a strong foundation in these essential skills.

### Finance Internship, Honda UK, Bracknell

JUNE 2021 – JULY 2022

- Successfully completed 13 month ends and 1 year end on placement which involved creating and updating Balance Sheets, Income Statements, performing Bank reconciliations and preparing end of month Finance Packs.
- Liaised with Senior Financial Associates, presenting updated company accounts and providing personal analysis and insights to improve internal processes.
- Took on additional leadership responsibilities by leading interviews and managing applications for the next Finance Internship position.
- Used Excel and SAP daily and efficiently ensuring a high proficiency with the software.

### Social Secretary , NTU Helping Out in the Community

SEPTEMBER 2022 – JUNE 2023

- Social Media manager for University society NTU Help In the Community which involved creating engaging and informative posts on **Canva** and ensuring the posts were tailored to the brand/demographic.
- Facilitated social events for the community by liaising with venues and promoting them effectively through various social media channels

### Self Employed , Over My Shoulder (OMS)

MARCH 2020 – SEPTEMBER 2022

## Details

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## NATIONALITY

British

## Links

[Linkedin](#)

## Skills

Excel  
SAP  
MATLAB  
Can do attitude  
Time Management  
Highly Motivated  
Tenacity

## Languages

English

French

- Established a budget-friendly online handbag venture amidst the 2020 lockdown in response to the burgeoning trend of e-commerce.
- Liaised with overseas production companies and negotiated competitive pricing for the bags.
- Developed a captivating online platform to promote the bags, utilizing advanced analytics to discern the most effective post types and their underlying drivers of engagement.

## Education

### Mathematics, Nottingham Trent University, Nottingham

SEPTEMBER 2019 – JULY 2023

- Obtained **Upper Second Class Honours Degree** in Mathematics
- Completed one year industrial experience at **Honda Finance Europe**
- Dissertation written on '**Exploring the Mathematical Foundations of the Blockchain and its Potential to Transform the Financial Industry**'.
- Obtained a **1st in Data Analysis** module
- Obtained a **1st in Professional Mathematics Skills module** which involved creating a large data set and analysing the most influential area of data within the dataset by creating R trees in R studio.
- Proficient in coding and experience in creating code.

### King's High School , Warwick

SEPTEMBER 2012 – SEPTEMBER 2019

- Completed A levels in Mathematics, Physics and Music
- Completed 10 GCSE's
- Completed Grade 8 Singing with distinction.

### Seoul Foreign British School , South Korea

MARCH 2003 – SEPTEMBER 2012

- Attended an International School in Seoul, South Korea.

## Courses

### Investment Analyst Launchpad Program , Quill Capital Partners

JULY 2023 – PRESENT

### CPD - Investment Risk & Taxation , CIFA

JULY 2023 – PRESENT

## References

Mr Phil Harris from Honda Finance Europe

phil.harris@honda-eu.com

## Hobbies

Classical Pianist

Completed 2 Half Marathons