DIEGO CICONI

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SUMMARY

Finance professional with 14+ years of experience in investment research, asset management, credit risk, and corporate finance. Proven track record of driving performance and leading global teams. Native speaker of Portuguese and fluent in English and Spanish. Brazilian-Italian national currently based in Chile.

CORE COMPETENCIES

- Fundamental Research
- Portfolio Management
- Data Analysis
- Corporate Finance
- Mergers & Acquisitions
- Credit Analysis
- Responsible Investing
- Investment Management
- Project Management

PROFESSIONAL EXPERIENCE

CREDICORP CAPITAL ASSET MANAGEMENT | SANTIAGO, CHILE | 2018-PRESENT

Head of Equity Research and Lead Financials Analyst - Vice President – Buy Side

- Led and trained a team of nine equity research analysts across Chile, Peru, and Colombia, overseeing the research of over 400+ Latin American equities, leading to a 35% increase in the team's analytical output.
- Engineered a collaborative framework with the Fixed Income Research team that informed $8B+ in cross-asset investment decisions.
- Coordinated with Macro teams on 20+ key policy shifts, translating complex economic data into strategic insights that propelled a 10% improvement in portfolio agility in emerging markets.
- Delivered investment recommendations impacting $500M+ in assets, with a focus on financials and tech sectors, consistently ranked as the #1 alpha-generating sectors throughout tenure.
- Instrumental in the launch and marketing of the LatAm Equities Flagship Fund, amassing US$180M in assets under management, steering it to recognition as the top-performing fund in its class for the year 2021.
- Designed a proprietary ESG Materiality methodology adopted firm-wide, influencing over $1B+ in investments to align with Responsible Investing standards within 6 months.
- Led the development of a research management platform, centralizing analysis for 500+ securities, which doubled research efficiency and reduced decision-making time by 50%.
- Directed a research initiative that fused equity and fixed income insights, enhancing asset allocation strategies for 10+ funds and contributing to an increase in fund performance.

SCOTIABANK GLOBAL BANKING & MARKETS | SANTIAGO, CHILE | 2011-2018

Equity Research Senior Associate – LatAm Banks and Non-Banks Financials – Sell Side

- Wrote strategical research notes and developed new valuation models to provide investment recommendations for Latin American financial institutions, achieving a model portfolio annual performance of 12% on average.
- Conducted comprehensive research on M&A, IPOs, and financial transactions, publishing over 20 reports on specific deals to identify potential investment opportunities.

- Trained and mentored 2 junior analysts, doubling the coverage universe and tripling the number of published reports within 2 years, boosting client interaction by 300%.
- Cultivated and maintained relationships with investor relations departments and C-level executives from 25 covered companies.

Credit Solutions Manager – Corporate Banking

- Collaborated closely with sales teams to provide credit recommendations for Chilean blue-chip companies, directly responsible for a credit portfolio of ~US$ 1.2 billion across various economic sectors.
- Conducted comprehensive credit evaluations of new and existing clients, utilizing financial statements, credit reports, and market analysis to make informed credit decisions.
- Present and justify credit proposals to the Bank's Global Risk Management Officers in Canada, focusing on effective structuring, risk reduction, portfolio performance, as well as suggesting opportunities for improvement.
- Nurtured strategic relationships with both external stakeholders, like client representatives, and internal colleagues, including Relationship Managers and Offshore Risk Credit Officers.

EVALUESERVE | VALPARAISO, CHILE | 2010-2011

Equity Research Associate

- Collaborated with major banks, including Deutsche Bank and Royal Bank of Canada, as a third-party analyst, conducting in-depth analysis on Latin American banks and US utilities.
- Provided valuable support to New York-based analysts by building valuation models and writing weekly research notes, scoring 100% client satisfaction throughout tenure.

PRICEWATERHOUSECOOPERS | SAO PAULO, BRAZIL | 2008-2010

Corporate Finance Associate

- Developed and delivered compelling sales pitches, generating 10+ mandates in M&A and corporate restructuring deals across diverse industries, totaling R$2 billion in two years.
- Prepared winning proposals and managed a portfolio of projects and mandates, serving as the primary point of contact for clients to ensure successful completion and satisfaction.

EDUCATION

University of London, London - UK
Bachelor of Science in Computer Science

Faculdade de Tecnologia Carlos Drummond de Andrade, São Paulo – Brazil
Associate Degree in Finance

ADDITIONAL CREDENTIALS

TECHNICAL SKILLS	Microsoft Office (Word, Excel, PowerPoint), Bloomberg, FactSet, Python, MySQL, Machine Learning
LANGUAGES	English, Spanish, Portuguese