



Katasha Fiser

Fund Manager

A dedicated Fund Manager with 5 years of experience in managing investment portfolios, generating consistent returns, and minimizing risk. Skilled in conducting thorough market analysis, identifying growth opportunities, and implementing effective investment strategies. Adept at maintaining strong client relationships and providing timely communication on fund performance. Proven track record of delivering results and committed to continuous professional development in the ever-changing financial landscape.

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123 Maple Street, Columbus, 
OH 43215

Education

Master of Business Administration in Finance at Fisher College of Business, Ohio State University, Columbus, OH

Aug 2013 - May 2018

Relevant Coursework: Financial Management, Corporate Finance, Investment Analysis, Financial Markets, Risk Management, Portfolio Management, International Finance, Financial Accounting, Managerial Economics, and Financial Strategy.

Links

[linkedin.com/in/katashafiser](https://www.linkedin.com/in/katashafiser)

Skills

Risk assessment



Portfolio optimization



Quantitative analysis



Bloomberg Terminal proficiency



Market forecasting



Performance evaluation



Employment History

Fund Manager at Charles Schwab, OH

May 2023 - Present

- Managed a \$500 million investment portfolio, consistently outperforming the benchmark by 5% annually and generating over \$50 million in returns for clients within 3 years.
- Successfully identified and executed on investment opportunities in various sectors, resulting in a 20% increase in the fund's assets under management (AUM) from \$1 billion to \$1.2 billion in 2 years.
- Implemented a risk management strategy that reduced portfolio volatility by 10%, preserving capital and improving the risk-adjusted return of the fund.
- Spearheaded an investor relations initiative that attracted over 100 new high-net-worth clients, increasing the fund's AUM by an additional \$300 million.

Assistant Fund Manager at Fidelity Investments, OH

Aug 2018 - Mar 2023

- Managed a \$500 million investment fund, consistently achieving an annual return of over 10% for three consecutive years, outperforming the benchmark index by 5%.
- Successfully identified and executed on investment opportunities in various sectors, resulting in over \$100 million in realized gains for the fund.
- Developed and implemented a risk management strategy that reduced portfolio volatility by 20%, ensuring the fund maintained its strong performance during periods of market turbulence.
- Streamlined the fund's reporting process, reducing the time spent on quarterly reporting by 30%, enabling the team to allocate more time towards identifying new investment opportunities.

Certificates

Chartered Financial Analyst (CFA)

Oct 2021

Certified Portfolio Manager (CPM)

May 2020