

# Sophocles Alex Sophocleous, CFA

+44 203 808 5150 / +357 99 572696 • [sophocles@fatalpha.com](mailto:sophocles@fatalpha.com)  
[linkedin.com/in/sophoclessophocleous](https://www.linkedin.com/in/sophoclessophocleous)

## EXPERIENCE

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### **FatAlpha**

July 2012 – Present

#### *Founder, Portfolio Manager*

- Raised and manage third-party money under an agreement with the financial arm of the Cyprus Development Bank.
- Developed an investment strategy that combines proprietary quantitative models with qualitative analysis.
- Consistently outperformed the market without the use of leverage and with a beta of under one.
  - 07/2012-12/2016: gross 157% vs 78 for the S&P 500 (SPY)
- Created, designed and maintain the fatalpha.com website.
- Author a monthly newsletter which is distributed to over 400 subscribers.
- Organise an annual 2-day event with global fund managers and value investors.
- Publish articles and present investment ideas at various conferences.

### **Cyprus International Institute of Management (CIIM)**

February 2017 – Present

#### *Visiting Lecturer*

- Created and designed a course that is the first of its kind and the only one offered in Cyprus.
- Teach a practical course on active portfolio management. Students generate, present, and discuss their own investment ideas and run simulated portfolios. In addition, they are exposed to highly respected global investment professionals from my network that have been invited to speak to them live and via online conference calls from abroad.

### **Argo Capital Management Ltd.**

September 2002 – February 2014

#### *Executive Director*

- Award winning London-based Emerging Markets hedge fund manager with peak AUM >\$3B.
- Evaluated investment opportunities in various Emerging Markets with a focus in Latin America and Asia. My positive contribution assisted in the growth of the business from <\$100m to >\$3B
- Participated in structuring all major fund deals in multiple asset classes and firm activities, including portfolio management, restructurings, and global Emerging Markets research in equities, high-yield and distressed fixed income.
- Designed and maintained a quantitative macro model the firm used to assess sovereign default probability. Used regression models, as well as financial models, to access high yield corporate credits.
- Traded \$20m Asian equity portfolio for the Special Situations Fund.

### **European University Cyprus**

November 2002 – May 2003

#### *Lecturer*

- Taught and prepared candidates for the Chartered Financial Analyst (CFA) exams with a 90% success rate.

### **C.N. Hadjigavriel Stockbrokers Ltd., Nicosia, Cyprus**

October 2000 – August 2002

#### *Head Investment Analyst*

- Setup the research department which covered equities in Cyprus, Greece and Europe.
- Created network shared applications which increased front office efficiency and sales.

- Established relationships with investor relations of publicly traded firms, and their CFOs.
- Co-managed Employees' Provident Fund which generated positive returns during the equity bear market.

**Equity Securities Investments Ltd.**, Minneapolis, MN May 2000 – September 2000

*Investment Banking Analyst – Mergers & Acquisitions*

- Research & firm valuation. Projects worked on involved restructuring, asset sales and M&A

**University of Illinois**, Champaign, IL • *Teaching Assistant for Finance* Spring 2000

**Dean Witter (now Morgan Stanley)**, Champaign, IL • *Semester Internship* Spring 1998

**Parma Brokerage**, Nicosia, Cyprus • *Summer Internship* 1997, 1999

**United States of America Embassy**, Nicosia, Cyprus • *Security* January 1996 – July 1996

**National Guard**, Nicosia, Cyprus July 1994 – January 1996

*Lance Corporal*

- In-charge of a 12-man troop house on the “green line” (military border).
- Establish a rapport with the United Nations soldiers in my troops’ area of control.
- Acted as translator between highly ranked Greek Cypriot Military and United Nations.

## EDUCATION

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### **University of Illinois at Urbana-Champaign**

Double major. BA in Economics and Finance, 1999

Cumulative GPA: 3.7/4.0 Major GPA: 3.9/4.0

Graduate Student in Finance, Spring 2000

## CERTIFICATIONS

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**CFA** (Chartered Financial Analyst) **Charterholder**, **FRM** (Financial Risk Manager), **PRM** (Professional Risk Manager), **Advanced Certification** (CySEC)

## HONORS & AWARDS

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- **Fulbright Scholar**, Full undergraduate scholarship
- Departmental Distinction from Economics and Finance departments
- James Scholar, 1996-1999

## SKILLS & OTHER ACTIVITIES

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- Fluent in English (born in Nova Scotia, Canada) and Greek.
- Premium Contributor for Seeking Alpha website – occasionally write articles on investments.
- Played a principal role in the creation of the Real Client Investment Portfolio Class that manages \$1 million at the University of Illinois. Since January 2000 I act as an advisor to the class by discussing with students their stock recommendations.
- Computer proficiencies: Bloomberg, TradeStation, Microsoft Office, WordPress, etc.
- Hobbies include golf and sailing (completed Royal Yacht Association Competent Crew course and Day Skipper Shorebased Theory course).