

Joseph (Joey) Gwena

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PROFESSIONAL SUMMARY

Motivated and aspiring commodities Trading Assistant / Junior Trader with a targeted focus on energy markets and a dedication to leveraging AI to unlock market insights from data. Achieved top 3 place in competitive trading simulations on actual platforms used in the Industry. Have a strong foundation in financial markets trading, strategy development and risk management gained through a highly tailored apprenticeship which led to a Level 6 Diploma (equivalent to a Bachelors) that I passed with a Distinction. I bring resilience, discipline, and a team-oriented mindset to a trading team gained from rugby and athletics championships. Excited to bring this commitment and technical expertise to a trading institution.

KEY SKILLS

- **Commodities Trading:** Proficient in trading commodities with simulation experience in managing long and short positions on near- and far-end contracts. Skilled in identifying pricing trends, optimizing timing, and executing risk management strategies, particularly in energy sectors.
 - **Prompt Engineering for AI in Trading:** Developing focused prompt engineering skills to leverage AI to unlock insights from data, improve decision making and enhance automation across core functions.
 - **Sentiment Analysis:** Leveraging AI for sentiment analysis focusing on global geopolitical factors, economic indicators, supply chain and inventory level analysis and gauge the general sentiment from market analysts, financial news and investor sentiments with a goal of applying data-driven strategies in trading.
 - **Python:** Learnt python and now developing skills to use it with large data sets.
 - **Sports-Driven Resilience:** Background as an athletics champion and experience in competitive rugby, football and basketball have instilled discipline, resilience, and a results-oriented approach that aligns with the fast-paced trading environment.
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EDUCATION

LEVEL 6 DIPLOMA IN APPLIED FINANCE – (Grade: – Distinction

June 2024

ACCREDITED BY LONDON INSTITUTE OF BANKING & FINANCE (LIBF)

- Hedge Fund Trading & Asset Management
- Sales & Trading and Market Making
- Investment Banking & Corporate Finance

FINANCIAL MARKETS TRADING APPRENTICESHIP

June 2022 - Current

- Introduction to financial markets trading & understanding financial instruments
- Fundamental analysis vs technical analysis
- Technical Analysis Trading strategies
- Trading Risk Management
- Commodities markets trading
- Leveraging AI in commodities trading
- Introduction to Portfolio Management:

CHARTERED INSTITUTE OF SECURITIES AND INVESTMENTS

June 2023

Introduction to Securities and Investments

- Covering the economic environment, equities, bonds, derivatives, investment funds, financial services regulation & professional integrity; taxation & other financial products

MILTON KEYNES COLLEGE - (A Levels)

2020- 2022

BTEC Business Level 3 Extended Diploma

- Grade:- Distinction, Merit, Merit (DMM)

STOWE SCHOOL - (GCSEs)

2018- 2020

- Achieved 8 GCSE's including Math's, English and Science

PROFESSIONAL EXPERIENCE

AMPLIFYME

June 2024

SUMMER FINANCIAL MARKETS/IBD ANALYST

- Consolidated my financial knowledge through trading simulations that I executed and through supporting colleagues
- I delved into buy-side strategies, including global macro, yield curve, long/short equity, and portfolio management strategies, achieving top performance against 100+ peers in trading simulations
- Developed my trading risk management techniques including cross-trading, pre-positioning, skewed pricing, and hedging, through hands-on experiences, securing first place in trading games
- Conducted market research and prepared reports on market trends and investment opportunities
- Executed trades using my discretionary trading strategy, executing trades on the CME platform
- Gained experience in trade execution platforms and order types
- Collaborated with analysts and traders to understand trading strategies and risk management
- I analysed M&A potentials, credit risks, and IPO prices through financial modelling
- Completed a PE LBO excel model

AMPLIFYME

June 2024

TRADING SIMULATION

- Finished 3rd place in a FOMC December 13th trading simulation generating a total PnL of \$6,030,400
- Finished 8th place in a US CPI 12th May trading simulation generating a total PnL of \$120,440
- Participated in a trading simulation competition, gaining practical experience
- Executed trades, tracked portfolio performance, and adjusted strategies
- Demonstrated a commitment to continuous learning and improving trading skills

AMPLIFYME

June 2024

SALES & TRADING SIMULATION

- I completed the simulation with a score of 73% acting on the sell-side of the market in sales and trading, generating a total commission of \$153,212
- I managed to complete 18 trades through the chat portal and 92 trades through the exchange function
- I achieved an average exchange impact of 0.2%
- I achieved 73% acting as a PM/Trader on the buy-side of the industry, generating a total PnL of \$1,052,462 managing a \$20,000,000 portfolio

AMPLIFYME

June 2024

HEDGE FUND & ASSET MANAGEMENT ESG SIMULATION

- Acted as a portfolio manager at a hedge fund & asset management firm with the responsibility to generate a return for a client who wanted a ESG compliant portfolio
- Generated a total PnL of \$4,174,240 with a starting capital of \$20,000,000
- I achieved a total score of 72% in Buy-side-Risk management which measured my discipline to stay within my stop loss limits and target risk to reward ratio
- I achieved 86% in Risk Appetite (RA) measuring my level of conviction on my trades and ability to get my clients money invested rather than suffering from indecision and sitting in too much cash

PROJECTS UNDERTAKEN TO GAIN USEFUL EXPERIENCE

LEVERAGING AI & MACHINE LEARNING IN COMMODITIES TRADING

Dissertation

October 2024

- Did a dissertation on the topic "Leveraging AI and Machine Learning (ML) in Commodities Trading.
- Coming from a hypothesis that leveraging AI and ML is the future of commodities trading, the dissertation sought to test that hypothesis by exploring how and where AI is being deployed within commodities hedge funds.
- The dissertation relied on a desk literature review and industry insights which are yet to be tested through interviews with Hedge Fund Managers
- The indication from the desk review is that the potential for gaining competitive advantage through leveraging AI is huge yet not many hedge funds have fully adopted AI as of now.

PROMPT ENGINEERING – Leveraging AI.

March 2024

- The project was to design a python based algorithmic trading bot using my prompt engineering skills and leveraging the power of AI
- I designed 3 simple trading strategies to automate through a trading bot
- I zeroed in on the libraries the bot had to extract data from.
- Utilising my prompt engineering skills and python knowledge, I wrote the codes for each strategy to execute trades
- I deployed the codes onto quant connect platform
- I ran the codes and back tested the bot
- I managed to execute transactions utilising my trading bot.

24 HOUR M&A IBD SPRINT SIMULATION

June 25th 2024 – June 26th 2024

- The simulation project was to help Microsoft acquire Activision
- I acted as an analyst working at AmplifyMe Investment Bank (AMIB)
- Completed the three financial statements
- Had to create a pitch deck as well for the Microsoft team
- Conducted research and prepared a report on a specific sector within the financial markets
- Analysed market dynamics, key players, and potential investment opportunities
- Presented findings to professors and peers, showcasing analytical abilities

FINANCIAL MODELLING PROJECT

June 2024

- Created a financial model for Tesla
- Performed valuation analysis and presented recommendations
- Gained experience in building financial models and understanding valuation techniques

OTHER ACHIEVEMENTS

- I am a Stoic as I attended the prestigious Stowe School
- Qualified for Junior Athletic Olympics (100m & 200m sprint)
- 1st XV Team Rugby Player (when in GCSE)
- U18's Northampton Saints Academy at 16 years old + 1st XV Football & Basketball Player