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PROFESSIONAL SUMMARY

Senior Business Analyst with 25+ years of experience across **investment management, superannuation, capital markets, and risk** — spanning market, credit, counterparty, concentration, liquidity, and operational domains. Skilled at partnering with investment teams (portfolio construction, exposure management, asset allocation), risk analysts, private markets, and data specialists to understand complex workflows and translate them into clear business and technical deliverables. Proven ability to support the full life-cycle of risk analytics and investment platforms, from requirements gathering and vendor selection to user stories, testing, and business adoption.

Brings deep expertise in **investment management processes and risk analytics**, with a track record of delivering **data-driven solutions** that strengthen transparency, compliance, and decision-making. Adept at building strong relationships with investment and risk stakeholders, ensuring solutions meet business needs while aligning with regulatory and operational requirements. Hands-on background in SQL, Python, C/C++, Java, REST APIs, Data-modelling and AI tools enables credible engagement with technical teams. Holds a **Master of Applied Finance** (Macquarie) and a **Master of Information Technology** (UTS).

Employment Overview

Company	Role	Duration
State Street	Senior Business and Data Analyst (contract)	6 months
AustralianSuper	Senior Business and Data Analyst (contract)	2 years
ASX Ltd	Senior Business Analyst (contract)	1 year
ANZ Bank	Senior Business Analyst (contract)	1 year
Westpac Bank	Senior Business Data Analyst (contract)	2 years
Vanguard Australia	Senior Business Analyst (contract)	2 years
National Australia Bank	Senior Consultant - FX (contract)	1 year
ANZ Melbourne	Technical Business Analyst (contract)	3 years
National Australia Bank	Technical Business Analyst/PM (contract)	6 months
Charles River	Senior Implementation Manager	3 years
Praemium Ltd	Business Analyst/Developer	1 year
Deutsche Bank	Business Systems Analyst	5 years
Online Trading Systems	Senior Developer	3 years

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PROFESSIONAL EXPERIENCE

Alpha Enhanced ABOR Implementation – State Street **Jan 2026 – Jun 2026**
Role: Senior Business and Data Analyst (contract)

Summary: Led business and data analysis for the Enhanced Accounting Book of Record (eABOR) workstream on the State Street Alpha Data Platform (ADP) implementation for Australian Retirement Trust (ART). Defined end-to-end T+1 data ingestion, transformation, and downstream delivery requirements across upstream accounting engines and external reporting consumers. Standardised interface documentation across the Alpha delivery framework to align technical architecture with client SLAs and regulatory reporting mandates.

Key Achievements:

- **BRD & Architecture Standardisation:** Authored the eABOR ADP Interface Business Requirements Document (BRD), aligning the structure with the broader State Street Alpha delivery framework to accelerate stakeholder sign-off.
- **End-to-End Data Flow Mapping:** Mapped daily T+1 data pipelines from upstream sources (MCH/Accounting, FADS, PRD, and NGP) through Managed File Transfer (MFT) and cloud storage into ADP, governing downstream extracts to Ortec (Attribution) and Matrix (Reporting).
- **Core Financial Requirements:** Defined high-level business requirements and Given/When/Then acceptance criteria for critical investment data domains, including NAV Date standardisation, Futures notional exposure and cash-backing mapping, and Securitised asset classification and look-through.
- **SLA & Data Quality Governance:** Validated operational batch timings (14:00 AEST books close through 20:00 AEST downstream delivery) and defined data quality controls, completeness checks, and exception alerting rules to prevent corrupted feeds from reaching downstream systems.
- **Stakeholder Alignment:** Facilitated requirements alignment and review sessions across State Street Investment Analytics (SSIA), Alpha Data Services (ADS), and ART client teams to resolve scope dependencies and confirm target-state operating models.

Impact: Established a clear, standardised requirements blueprint for ART's eABOR data delivery on the Alpha Data Platform, reducing ambiguity between accounting operations and technical build teams. Strengthened downstream reporting integrity and SLA predictability for attribution and client reporting feeds.

Core Skills: State Street Alpha Data Platform (ADP); Enhanced ABOR (eABOR); Business Requirements Documents (BRD); T+1 Data Pipelines & Interface Mapping; Snowflake / Cloud Data Ingestion; Futures Exposure & Cash Backing; Securitisation Look-Through; NAV Date Validation; SLA & Data Quality Governance; User Stories & Acceptance Criteria (Given/When/Then); Stakeholder Management (SSIA, ADS, Superannuation).

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Investment Management Platform Implementation – AustralianSuper **Aug 2023 – Jun 2025**
Role: Senior Business and Data Analyst (contract)

Summary: Partnered with investment teams, risk analysts, private markets, and data specialists to modernise investment management processes for Australia's largest superannuation fund. Supported the selection and implementation of a new investment and risk analytics platform (migration from Aladdin to LUSID), establishing a centralised investments data warehouse and golden source of truth. Led business analysis across exposure management, portfolio construction, asset allocation, execution management, and risk oversight, ensuring business requirements were translated into actionable deliverables for technical teams.

Key Achievements:

- Gathered, validated, and documented business and data requirements across asset classes (equity, fixed income, credit, cash, alternatives), ensuring investment and risk workflows were fully supported.
- Partnered with exposure management teams to specify detailed rebalancing scenarios including capital allocation among options based on AustralianSuper's bespoke methodologies.
- Worked with the asset allocation team to gather requirements for asset allocation targets for all pre-mixed options.
- Facilitated workshops with portfolio managers, risk analysts, vendors, and developers to capture workflows, prioritise requirements, and gain sign-off under budget and time constraints.
- Produced user stories, acceptance criteria, and functional specifications to guide system configuration and delivery.
- Led UAT, regression testing, and post-go-live hypercare, improving workflow efficiency, risk transparency, and investment decision support.
- Applied hands-on technical expertise (SQL, REST APIs, LUSID config) to support data validation, reconciliation, and workflow testing, strengthening credibility with technical teams.

Impact: Enabled AustralianSuper to implement a modern investment and risk analytics platform, improving transparency, workflow efficiency, and decision-making. Delivered a trusted golden source of investment and risk data, reducing manual effort and enhancing collaboration between investment, risk, and operations teams. Reduced operational risk by migrating spreadsheet-based processes and tools onto the platform.

Core Skills: Business analysis & requirements elicitation; investment workflows (portfolio construction, exposure management, asset allocation); risk analytics & modelling (VaR, factor exposures, Greeks, stress testing, attribution models); vendor/system selection & implementation; user stories & acceptance criteria; stakeholder engagement; SQL & Python for validation; data governance & lineage.

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Low-Latency Market Data Integration – ASX **Jun 2022 – May 2023**
Role: Senior Business Analyst (contract)

Summary: Led business analysis for the integration of ASX market data with CBOE's new PITCH protocol, a low-latency UDP multicast feed for order book and trade dissemination.

Key Achievements:

- Analysed CBOE PITCH protocol specifications to define ASX system requirements for order book and trade data ingestion.
- Worked closely with architects to produce detailed technical specifications for low-latency data handling.
- Defined operational workflows for managing real-time multicast feeds, including failover and recovery scenarios.
- Captured requirements in Jira and maintained documentation in Confluence for full traceability through the delivery lifecycle.
- Coordinated testing and validation with development and QA teams to ensure feed integrity, accuracy, and performance.

Impact: Enabled ASX to meet new CBOE integration standards, ensuring continued delivery of high-performance market data to trading participants.

Core Skills: Low-latency market data, UDP multicast, CBOE PITCH, order book processing, real-time systems analysis, technical specification writing, Jira/Confluence.

Regulatory Reporting Transformation – ANZ **May 2021 – May 2022**
Role: Senior Business Analyst (contract)

Summary: Led business and data analysis for ANZ's capital markets regulatory reporting projects, enhancing reporting engines and delivering compliance with JFSA and MAS reporting rules. Acted as both RegTech BA and data engineer, gathering and validating regulatory data requirements, mapping trade lifecycle data across multiple systems, and implementing ETL-style pipelines and controls for ingestion, transformation, reconciliation, and publication of regulatory submissions.

Key Achievements:

- Analysed regulatory requirements (JFSA, MAS) and mapped source system data from Murex, Wall Street, MIDANZ, FX Connect, Marketwire, TOMS, and VOLBroker to DTCC formats for accurate reporting.
- Defined and validated data requirements to support end-to-end regulatory processes, ensuring golden source identification and future-state compliance workflows.
- Implemented ETL-style data engineering tasks, including transformation rule definition, exception handling, and reconciliation logic using SQL, scripts, and Xceptor.
- Built and maintained data pipelines and workflows that ingested trade and position data, applied business rules, and published validated outputs to DTCC.
- Conducted dataset exploration and data quality assessments with SQL, VBA, and Excel to identify mismatches, gaps, and reporting risks.
- Designed and documented data lineage for regulatory submissions, providing traceability from trade capture to DTCC output.

- Defined and enforced data quality rules and exception management processes, automating breaks identification and resolution in Xceptor/TriResolve.
- Delivered the JFSA DTCC re-architecture project, improving data flow automation, regulatory controls, and end-to-end transparency.
- Authored detailed user stories, functional specs, and acceptance criteria, bridging BA requirements with technical implementation teams.
- Supported testing, go-live, and post-implementation validation of regulatory submissions, resolving data and process exceptions quickly under strict deadlines.

Impact: Modernised ANZ's regulatory reporting capability by re-engineering data pipelines and strengthening reconciliation frameworks, reducing operational risk from manual processes, and ensuring accurate, timely compliance with JFSA and MAS rules. Improved data lineage, quality, and governance across the trade lifecycle, enabling regulators and internal risk teams to rely on consistent, transparent reporting.

Core Skills: Regulatory reporting (JFSA, MAS, DTCC); data requirements gathering & validation; source system mapping; ETL / data pipeline design (SQL scripts); reconciliation systems (Xceptor, TriResolve); dataset exploration (SQL, VBA, Excel); transformation rules & exception handling; data lineage & golden source documentation; data quality rules; trade lifecycle & cross-system integration.

Capital Markets Data Warehouse & Regulatory Reporting – Westpac Mar 2019 – Apr 2021
Role: Senior Business Data Analyst (contract)

Summary: Designed and delivered Westpac's Capital Markets Data Warehouse as a single golden source for global regulatory reporting and surveillance. Covered data modelling, lineage, quality rules, and governance across multiple regulatory jurisdictions.

Key Achievements:

- Created logical data models aligned to Westpac data modelling standards to support regulatory regimes including MiFID, MAS, JFSA, and CFTC.
- Defined golden source data, critical data elements (CDEs), and business definitions for complex OTC and structured products.
- Built data pipelines and transformation rules in Palantir to serve as a central reporting hub.
- Documented full trade lifecycle coverage from IOI to settlement, ensuring reporting completeness and accuracy.
- Established data quality rules and governance protocols to meet compliance requirements.

Impact: Enabled Westpac to meet diverse global regulatory reporting obligations from a single source of truth, improving accuracy, transparency, and operational efficiency.

Core Skills: Regulatory reporting (MiFID, MAS, JFSA, CFTC), golden source, data modelling, data lineage, Palantir, OTC/structured products, trade surveillance.

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Global Trading & Risk Platform Rollout – Vanguard Australia **Jun 2016 – Jun 2018**
Role: Senior Business Analyst (contract)

Summary: Rolled out and enhanced Vanguard's global Charles River IMS (CRIMS) platform in Australia, aligning local operations with global standards.

Key Achievements:

- Upgraded CRIMS to v9.1, onboarding new funds including a low-volatility fund.
- Built portfolio manager workbench profiles and PM-to-trader workflows.
- Configured compliance rules, onboarded hedged/unhedged indices, and resolved BAU issues.
- Integrated data flows with custodians and implemented valuation requirements (IBOR/ABOR).

Impact: Aligned Australian trading and risk operations with Vanguard's global platform while meeting local compliance and product requirements.

Core Skills: Charles River IMS, compliance rules, BPMN 2.0, data integration, valuations, XML configuration, SQL validation.

Single Dealer FX Platform Rollout – NAB (via Excelian) **Jan 2015 – Dec 2015**
Role: Senior Consultant - FX (contract)

Summary: Delivered business analysis and functional support for NAB's FX dealing platform (StarXchange) and its integration with multiple upstream and downstream systems. Collaborated with architects, developers, and business stakeholders to ensure functional clarity, smooth delivery, and compliance with NAB's system and process requirements.

Key Achievements:

- Defined interface requirements and specifications for system integration.
- Developed and executed testing scenarios and test cases, ensuring quality and reliability.
- Facilitated workshops with business and support staff to present new functionality and capture feedback.
- Participated in agile ceremonies (sprint planning, daily stand-ups, release cycles) to ensure smooth delivery.
- Escalated and managed issues to ensure timely resolution with stakeholders.

Impact: Enabled NAB to enhance FX trading operations by ensuring reliable integration of StarXchange with surrounding systems. Improved delivery governance by aligning business requirements with agile practices and enhancing transparency across teams.

Core Skills: FX platforms, requirements gathering, agile delivery, system integration, test case design, stakeholder workshops, Jira.

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Global FX Platform Implementation – ANZ **Jun 2011 – Aug 2014**
Role: Technical Business Analyst (contract)

Summary: Led the business analysis and functional delivery for ANZ's multi-year program to replace its legacy FX and fixed income trade capture system (GFX Live) with the Wall Street System (WSS). The rollout spanned 16 international locations and covered the full FX trade lifecycle — from pricing and execution to risk management, confirmations, and settlement.

Key Achievements:

- Delivered the global rollout of WSS for ANZ's FX and money market desks, replacing 10+ upstream and downstream interfaces from GFX Live.
- Integrated with external and internal systems including accounting, back-office settlement, Reuters 3000, FX Connect, FX Online, and RightFax.
- Defined and implemented risk routing rules within WSS to meet trading desk and risk management requirements.
- Captured and documented detailed business and technical specifications for global FX workflows, ensuring alignment across 16 international markets.
- Designed and implemented reporting requirements for finance, settlements, trading, sales, and management.
- Produced and maintained current and future state process maps to manage operational change across multiple jurisdictions.
- Facilitated workshops and solution design sessions with traders, operations, and technical teams to manage gaps and resolve cross-functional issues.

Impact: Delivered a modern, globally consistent FX trading and risk management platform, reducing operational risk, increasing straight-through processing, and enabling real-time global exposure visibility. Strengthened ANZ's ability to manage complex FX products and enhanced the speed and accuracy of trade execution and settlement.

Core Skills: FX and money market products, Wall Street System (WSS), global platform rollout, trade lifecycle management, interface integration, risk routing, business process mapping, cross-border stakeholder management.

Data Platform Upgrade – National Australia Bank **Sep 2010 – May 2011**
Role: Technical Business Analyst/PM (contract)

Summary: Managed and delivered a high-impact project to upgrade NAB's central DataStage environment from v7.5.2 to v7.5.3 and migrate infrastructure from standalone hardware to a VM-based configuration. The environment integrated more than ten upstream and downstream systems, including HiPortfolio, PACE, pControl, and in-house applications.

Key Achievements:

- Gathered and reconciled cross-team requirements through workshops with business and technology stakeholders.
- Documented current and future-state processes, software/hardware requirements, and target benefits.

- Oversaw issue and risk identification, liaising with SMEs and business users to mitigate project blockers.
- Allocated tasks across architecture, infrastructure, security, and testing teams to ensure timely delivery.
- Prepared weekly project updates for senior management and monthly reports for the steering committee.
- Delivered the upgrade on time and within budget, meeting both technical and business objectives.

Impact: Successfully delivered a mission-critical infrastructure upgrade, strengthening NAB's data integration capability across custodian services. Improved operational resilience, reduced risk of system failure, and enabled ongoing scalability through a modern VM-based environment.

Core Skills: Custodian services, DataStage, project management, requirements analysis, infrastructure migration, stakeholder management, issue and risk management.

Investment Management Platform – Charles River Development **Jun 2007 – Sep 2010**
Role: Senior Implementation Manager – Asia-Pacific Region

Summary: Led complex, multi-country implementations of Charles River Development's enterprise-class investment management platform for top-tier asset managers across Asia-Pacific. Responsible for full project delivery — from requirements gathering and solution design to deployment, integration, and post-go-live support — for clients managing multi-billion-dollar portfolios. Promoted to Senior Implementation Manager based on consistent delivery success and team leadership.

Key Achievements:

- Delivered end-to-end platform implementations for major clients including AMP (Australia), LG Investment (Melbourne), GIC (Singapore), China Life (Beijing), China Asset Management (Beijing), and DIAM (Tokyo).
- Managed high-stakes, multi-million-dollar projects where clients demanded rapid delivery, absolute accuracy, and full regulatory compliance.
- Integrated the platform with market data providers, order management systems, and back-office settlement systems, enabling straight-through processing across multiple asset classes.
- Configured and customised complex compliance rules to reflect local regulations, client-specific mandates, and cross-border investment guidelines.
- Coordinated regional deployments under high travel demands, regularly rotating between client sites in Australia, Singapore, China, and Japan on a three weeks on-site, one week in Melbourne schedule.
- Built strong cross-cultural client relationships and internal team cohesion under intense delivery pressure.

Impact: Enabled leading asset managers to modernise operations, strengthen compliance, and streamline portfolio and trading workflows across equities, fixed income, and derivatives. Consistently delivered projects on schedule despite demanding timelines and shifting priorities, cementing Charles River's reputation in the Asia-Pacific region.

Core Skills: Enterprise investment management systems, global client delivery, portfolio modelling, compliance configuration, market data integration, multi-asset class workflows, straight-through processing (STP), cross-cultural stakeholder management.

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Wealth Management WRAP Platform – Praemium Limited **Jun 2006 – May 2007**
Role: Business Analyst/Developer

Summary: Headhunted by the CEO to deliver a major B2B integration between Asgard's wealth management infrastructure and Praemium's back-end WRAP calculation engine. Designed and automated daily portfolio processing for separately managed accounts (SMAs), model portfolios, tax-lot optimisation, and corporate actions, returning structured XML outputs with robust validation and error-handling. Eliminated significant manual processing and reduced operational risk, enabling Asgard to provide real-time, tax-aware portfolio positions to high-net-worth clients and advisors.

FI & Credit Trading & Pricing Systems – Deutsche Bank **Feb 2002 – Jun 2006**
Role: Business Systems Analyst

Summary: Engineered and enhanced legacy and next-generation Java-based fixed income pricing, trade execution, and settlement platforms for global and Australian markets. Integrated the legacy pricing platform with electronic execution venues such as Yieldbroker to enable straight-through processing (STP) and built automated confirmation and settlement workflows to minimise operational breaks. Partnered with traders, operations, and global development teams to customise the new global Java pricing platform for Australian products, instruments, and local market conventions.

Online Trading Systems, Melbourne, Australia **May 1999 – Feb 2002**
Role: Senior Developer

Summary: Architected and delivered one of Australia's first real-time, browser-based ASX market data platforms with full ownership over technology selection and design. Built a low-latency Visual C++ market data interface and engineered a custom Java–C++ integration bridge to stream live tick data into browser applets, supported by caching, incremental refresh logic, and end-of-day batch distribution. Pioneered database-triggered SMS price alerts for traders, delivering a scalable solution that remained in production for years.

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EDUCATION

Master of Applied Finance, 2005–2007, Macquarie University, Australia.

- *Major Units: Investment Management, Corporate Finance, Market Risk management, Hedge Fund Management.*

Master of Information Technology, 2002–2005, University of Technology, Sydney, Australia.

- *Major Units: Software Project Management, Distributed Databases, Distributed Systems, Knowledge Management, Corporate Data management.*

Postgraduate Diploma of Information Technology, 1998–1999, RMIT University, Melbourne, Australia.

- *Major Units: Software Engineering, Object Databases, Distributed Programming, Information systems management.*

Bachelor of Computer Science, 1995–1998, Hamdard University, Pakistan.

PROFESSIONAL CERTIFICATION

- Charles River IMS v9.1.x certifications for Manager Workbench, Blotter, Compliance and System Administration, 2010.
- Charles River IMS v8.2.x certifications for Advanced Compliance, System Administration, 2009.
- Charles River IMS v8.2.x certifications for Manager Workbench, Compliance and Blotters, 2007.
- Sun Certified Programmer for the Java 2 Platform, 2001.

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