

CV**Personal Data**

Balazs Faluvegi
CIO, Co-Founder
Blueopes

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**Professional Education**

- 1996 State Foreign Language Center – Budapest (www.itk.hu)
Official English Language Exam
- 1998 Petofi Sandor High School – Budapest (www.petofi-bp.sulinet.hu)
High-School Graduation, Extended English course
- 1999 Central-European Broker Education Foundation – Budapest (www.brokerkepzo.hu)
Official Stock Exchange Exam
- 2000 Embassy CES - New York, NY (www.embassyces.com)
Advanced Business English Language Course
- 2001 International Business School – Budapest (www.ibs-b.hu)
Economist Diploma, Investment Facultation
- 2001 EF Internationale Sprachschule - München (www.ef.co.hu)
German Language Short Course
- 2002 International Banking School – Budapest (www.bankarkepzo.hu)
Advanced Banking Profession Diploma
- 2004 International Banking School with the cooperation of Association of Investment Fund and Asset Management Companies in Hungary - BAMOSZ – Budapest (www.bankarkepzo.hu)
VAP Exam (wealth-, fund- and portfolio management)
- 2006 New Business School (closed) – Budapest (bit.ly/Qij9oD)
European Union tenders - project management course
- 2006 Market Technicians Association - New York, NY (www.mta.org)
Chartered Market Technician Exam, Level III
- 2007 International Banking School – Budapest (www.bankarkepzo.hu)
EFFAS/ACIIA – Advanced Investment Analyst Exam
- 2007 International Federation of Technical Analysts - Rockville, MD (www.ifta.org)
Certified Financial Technician – Level I
- 2013 The US SIF Foundation – Washington, DC (www.ussif.org)
Fundamentals of Sustainable and Responsible Investment
- 2016 MKB FinTech Academy – Budapest (www.mkbdigibank.hu)
FinTech Certificate

Professional Experience

Main activities

- 1997-1998 Europool Investment Fund Management Inc. (now part of the Intesa Sanpaolo group)
Trainee. Research and consulting on fund management, stock market order execution.
- 1999–2004 KF 99 Ltd.
Managing Director. Wealth management on international stock markets.
- 2004-2007 Bridge Wealth Management Ltd. - (www.bridgewealthmanagement.eu)
Managing Director, Chief of Research. Consulting on investments, financing and insurance. Writing business plans, organizing financing, and planning hedge transactions. Founding of Hungary's leading stock market simulation game with 16 000 participants in 2004, and educational portal. Successor of KF 99 Ltd.
- 2007-2014 Bridge Wealth Management Inc. (www.bridgewealthmanagement.eu)
CIO, Co-owner, Member of Board. Fund and Wealth Management, Investment Advisory Services for institutions and High Net Worth Individuals. Developing marketing strategies, reporting on activities to the Board of Directors. The company launched Hungary's first ever only technical analysis based fund in Spring 2008. The Fund was taken over by Access Fund Management Inc.). Founder and writer of HedgeFund.hu. Successor of Bridge Wealth Management Ltd.
- 2015- Blue Morpho Investments (www.bluemorphoinvestments.com)
CIO, Owner. Advising and research on Socially Responsible Investing (SRI). Developing and executing investment strategies,. Investment consulting for High Net Worth Individuals. Successor of Bridge Wealth Management Inc.
- 2016 Blueopes
CIO, Co-Founder. Blueopes is a low-cost, automatized wealth management service provider, focused on Socially Responsible Investments. My responsibilities include planning the strategies of various automated investment portfolios, considering liquidity, execution costs, ESG research, fundamentals, client risk profile development. Winner of MKB FinTech Competition in 2016.

Freelance or fixed term projects

- 2000-2002 IE-New York Broker Inc. - now part of the Intesa Sanpaolo group (www.ebroker.hu)
Research trainee, analyst, research newsflow editor
- 2003 ACR Building Ltd. (horizontpark.hu)
Finance director, project leader of a real estate development
- 2003-2004 ChartCenter Ltd., (www.chartcenter.hu)
Managing Director, Analyst of international stock markets, technical analysis
- 2004-2008 Lajos Faluvegi Foundation (www.faluvegilajos.hu)
Founder. The Foundation provides free investment education for individuals.
- 2009-2013 Access Fund Management Inc. (www.access.hu)
Portfolio Manager of a „Hedge Fund Following Fund”. Consultant for other absolute return funds and products, and PR activity.
- 2012-2014 ALTERA Wealth Management Plc. (www.alterart.hu)
Co-founder, Member of Board, CIO. ALTERA is a wealth management company introduced on the Budapest Stock Exchange.
- 2014-2015 Geo Professional Portfolio Inc. (www.geopro.hu)
Portfolio Manager. Developing investment strategy and wealth management on international stock, futures and currency markets.

Trainings, Seminars

- 2005 Emtrek Ltd., Hungary (Member of Training Board)
Sales and Marketing Training
- 2007 Conaction Kft., Hungary (Member of Training Board)
Communication Training
- 2007 Organized by Bloomberg (Frankfurt)
DeMark Indicators Seminar, personally presented by Thomas DeMark
- 2007 Online Marketing Educational Center – Damjanovich Nebojsa
Google Analytics, Adwords – Internet Marketing
- 2007 Conaction Kft., Hungary (Member of Training Board)
Presentation Skills Training
- 2007 Analog Artists Film Academy
Screenplay Writing Seminar
- 2007 International Federation of Technical Analysts
International Conference about Technical Analysis' actual progress
- 2009 Hungarian Writers Academy
Speech Writing Course
- 2013 Soter Education Center
Business Communication

Publications

Educational Book about „Investment Knowledge”, the publication reached several thousand students in high schools around Hungary. Publisher: Junior Achievement.

Author of „Investment Philosophy for Risk Takers” (ISBN: 978-963-06-7552-9) in Hungarian.

Author of „Clearly about Investments” (ISBN 978-963-08-5673-7) in Hungarian.

Co-Author of the official Educational textbook for the VAP Exam (wealth, fund and portfolio management).

Producer and presenter of DVD with 14 hours of educational material, in the following fields: Investments, Fundamental and Technical Analysis, Options Strategies, Absolute Return Strategies, including a 2 hour audio material about crisis strategies. Educational Courses more than 30 times for more than 2000 people in the following fields: Investments, International Financial Markets, Technical Analysis, Option Strategies, Equity Scans and Screening, Taxation of Investment Income.

More than 140 articles, publications, presentations and interviews in the Hungarian and European economic and financial press, including ISI Emerging Markets, Hedgefonder.nu, Hungarian National TV, Money Channel (Romania), Manager Magazine, Economy Radio – Hungary, Budapest Stock Exchanges conferences and road-shows, Romanian International Technical Analysis Conference, University of Economical Sciences Budapest.

Other Skills

Language: Hungarian (fluent), English (experienced level), German (limited level).

Software advanced knowledge: Different PC and mobile platform Operating Systems (Microsoft, Mac), Microsoft Office applications, HTML programming, SQL (non-expert level), Google Analytics, Google Adwords – 6 years experience. Bloomberg, TradeStation, Wealth-Lab Developer, Traders WorkStation, Saxo Trader, ML Downloader, DataTools. Touch typing (PL-6837, Ruander Education Center, recently at average 45 wpm).

Driving License: Category „B”, driven 397 000 kms in 16 countries since 1996, without accident.

Memberships, affiliate memberships or former memberships: Mensa, MTA, UK SIF affiliate, US SIF