

Grégory Bailly

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Conférence Gestion Privée : Comment piloter sa stratégie d'investissement en actions

- Portfolio Management Investment, Committee & Fund Supervisory Member
- IPO of 3 companies, Former Equity sell-side analyst + Corporate Finance
- Lecturer in Master II - University & emLyon (in English)
- Certified investment Analyst CIIA-EFFAS, AMF
- Cursus Master II Corporate Finance & Financial Engineering
- Graduate Engineer in Energy/ Environment/ Fluid Mechanics
- Excel VBA, Datastream, LSEG Workspace Reuters Specialist
- French mother tongue, Fluent in English, professional use



53 years old, married & 2 children

SENIOR PORTFOLIO MANAGER, CIIA

Since Feb. 2007

SENIOR PM

> 17 years



Milleis Private Bk ex Barclays Wealth - France

- ✓ Mutual Fund Supervisory Board & Investment Committee Member;
- ✓ Research and analysis of assets based on bottom-up analysis of blended fundamental & quantitative approach;
- ✓ Equity Investment Idea generation, bottom-up strategies & Portfolio construction;
- ✓ Stock-picking, market opportunities on a cross-sector & market timing basis;
- ✓ Creation & Implementation of a quantamental investment process, multi factors model and risks optimization;
- ✓ Portfolio management: development & monitoring global investment and trading strategies;
- ✓ Training the PMs team on Fundamental & Quantamental approach, synergies;
- ✓ Publication of morning, research notes & updates, investment recommendations and supply of new investment ideas;
- ✓ Extensive support of RM, holding presentations to clients;
- ✓ Regular one to one with selected listed companies' management (40 smids or large caps a year)

Jul.2004 - Feb.2007

SENIOR PRIVATE BANKER

2^{1/2} years



Banca INTESA SAN PAOLO - Fideuram Wargny Private Bank - Lyon

Missions: Portfolio management (UHNW/HNW), sale of tailored investment products & services

Aug.2003-Jul.2004

EQUITY ANALYST - PM

1 year

COGEVAL – Paris

Missions: Stock-picking, portfolio management

Jul.1998 - Jul.2003

SELL-SIDE EUROPEAN EQUITY ANALYST

2^{1/2} years



SOCIETE GENERALE plc - Paris

2^{1/2} years



AXA plc - Paris

Missions: Coverage of TMT, Aero-Defence & Petroleum sectors, promoting presentations to international institutional funds+ **Corporate-Finance 3 IPOs, recruitment and management of sell-side analysts**

Apr.1997- Feb.1998

Responsible for assessment, promotion & development – military service



MINISTRY of DEFENCE – General Delegation for Armament – Paris

Missions: Business development of aeronautical services for institutional foreign customers

OTHER ASSETS

2024

Best Practices in Portfolio Management | Institutional Video [Click Here](#)

2018

AMF Certification

Since 2015

Lecturer Fundamental Analysis, Quant modeling, derivatives

Macro-economic environment

Practical aspects of AM (in English)



Business & Finance School

Lyon II&III University

emLyon, Paris

Since 2008

BFM Business TV - Live with F. Lundy

2003

Certified Investment Analyst, CIIA



EFFAS / SFAF – Paris

1998

Post graduate course - Master II 225
Corporate Finance & Financial Engineering



Paris - Dauphine University

1996

Graduate in Engineering Energy/Environment/Fluid



Polytechnic National Institute

1995-1996

Engineering Final year project / internship

AIRBUS / SAFRAN - Paris

1993

Maths Sup/Spé T (Special Preparatory)

IT skills

Languages **French Mother tongue**

Leisure activities

LSEG, Datastream, "Quant" models, Excel VBA, Patio-pro

Fluent in English professional use & Teaching

Tennis, Bass-chorus in Viva La Vida Show, actor