



ROSA MARIC

HEAD OF ASSET MANAGEMENT DEPARTMENT

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ABOUT ME

Experienced and accomplished investment professional with over 18 years of expertise in capital markets, including more than a decade in asset management and over seven years in leadership roles. Skilled in navigating complex investment processes and responding effectively to evolving regulatory frameworks, supported by a strong mathematical background. Employed at one of Croatia's largest institutional investors, contributing to the management of a diverse portfolios across multiple asset classes and financial instruments, exceeding €4.4 billion in assets under management.

PERSONAL DETAILS

Date of birth: 8th October 1983

Nationality: Croatian

SKILLS

FINANCIAL EXPERTISE:

- CAPITAL MARKETS
- PORTFOLIO MANAGEMENT

TECHNICAL SKILLS:

- MS OFFICE
- BLOOMBERG TERMINAL
- QUANTITATIVE FINANCIAL MODELING

SOFT SKILLS:

- LEADERSHIP AND TEAM BUILDING
- ANALYTICAL THINKING AND PROBLEM SOLVING
- ADAPTABILITY

LANGUAGES:

- CROATIAN (Native)
- ENGLISH (Fluent)

WORK EXPERIENCE

PBZ CROATIA OSIGURANJE JSC Zagreb Jun 2017 - Present

Head of Asset Management Department

- Leading the team of seven professionals, including fund managers and assistants, fostering collaboration and ensuring alignment with organizational objectives.
- Contributing to the development and implementation of strategic and tactical asset allocation for managed funds, optimizing performance across portfolios covering multiple asset classes.
- Developing and implementing policies and procedures to adapt to changing regulations, with a goal of enhancing operational efficiency.
- Managing and coordinating cross-departmental projects, ensuring timely delivery and alignment with company goals.
- Actively participating in regulatory workgroups, influencing pension fund legislation in Croatia.
- Building and maintaining strong relationships with market participants, including issuers, brokers, and other counterparts, ensuring seamless operations.
- Maintaining regular communication with regulators to ensure compliance, collaborating with auditors during business operation review, and providing insights to media on the pension system as part of the financial literacy initiatives.

PBZ CROATIA OSIGURANJE JSC Zagreb Aug 2014 - Jun 2017

Fund Manager

- Contributed to the development and implementation of strategic and tactical asset allocation for managed funds.
- Managed fund assets across fixed income, equity, and alternative asset classes, with a strong focus on risk-adjusted returns.
- Conducted liquidity management, ensuring sufficient cash flows while optimizing portfolio returns.
- Performed individual security selection and executed trades across various instruments, including single stocks, bonds, ETFs, money market instruments, and derivatives.
- Performed due diligence on alternative investment funds, contributing to portfolio diversification and growth.
- Prepared detailed research reports and investment proposals, supporting data-driven decision-making processes.
- Regularly monitored and analysed fund performance, implementing adjustments to maintain alignment with strategic goals.

**PBZ CROATIA
OSIGURANJE JSC**
Zagreb
Feb 2007 - Jul 2014

Investment analyst

- Conducted financial modelling and fundamental analysis (DCF, peer analysis) to evaluate investment opportunities.
- Developed quantitative investment models for foreign equity markets.
- Applied technical analysis tools to identify market trends and support portfolio decisions.
- Produced market reports and insights to inform strategic decisions.
- Executed trades in equities and other market instruments.

EDUCATION

**UNIVERSITY OF
ZAGREB, FACULTY
OF ECONOMICS
AND BUSINESS**
Zagreb, 2013

Master's Degree

Master's Degree in Business study programme "Insurance and reinsurance"

**UNIVERSITY OF
ZAGREB, FACULTY
OF SCIENCE,
DEPARTMENT OF
MATHEMATICS**
Zagreb, 2007

Master of Science

Master of Science in Mathematics - university programme in Financial and Business Mathematics

CETIFICATES & LICENCES

Apr 2016

CROATIAN FINANCIAL SERVICES SUPERVISORY AGENCY

- Pension Funds Manager licence
- Pension Insurance Company Manager licence

Aug 2013

CFA INSTITUTE

- CFA Charter holder

Apr 2009

CROATIAN FINANCIAL SERVICES SUPERVISORY AGENCY

- Broker licence
- Investment advisor licence

Aug 2008

ACI

- ACI Dealing certificate