

OSCAR WELCH

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PROFILE

Aspiring wealth management professional with an analytical foundation from a Computer Science degree, growing technical grounding in financial markets gained while studying towards my CISI qualification. Combines a data-driven, detail-focused approach with strong client-facing and communication skills built through varied commercial roles and team-based projects, keen to apply this to delivering high-quality client service and support within a wealth management team.

RELEVANT EXPERIENCE

Cantab Asset Management | Work Experience

Jul 2022

- Researched companies' ESG practices, analysing sustainability and corporate responsibility credentials to inform investment views.
- Built and structured a comprehensive client database in Excel, organising large datasets for ongoing use by the team.
- Synthesised complex information into clear, concise summaries used in investment decision-making and client reporting.

Capital One | University Group Project

Nov 2023 - May 2024

- Worked within an Agile team to deliver a project to deadline, coordinating tasks and contributing to planning, direct experience of structured, deadline-driven teamwork.
- Applied rigorous testing methodology to validate outputs, reflecting an attention-to-detail mindset applicable to financial modelling and due diligence.

OTHER EXPERIENCE

Personal Investment Analytics Platform

May 2025 – Present

- Designed and developed a personal investment analytics platform for tracking multi-asset portfolios, performance and net worth.
- Integrated financial market data to automate security pricing and analyse portfolio exposure across sectors, geographies and underlying holdings.

RAGT | Selective Wheat Breeding (Seasonal)

Jun 2023 - Sep 2025

- Analysed observational data to identify trends and support strategic breeding decisions, including accurate documentation and recordkeeping.

Tesco | Store Assistant (Part Time)

Dec 2021 - May 2022

- Delivered professional client-facing service in a fast-paced commercial environment.

EDUCATION

CISI

June 2026 – present

- Independently completed the UK regulations and Professional Integrity as part of the Level 4 Investment advice diploma (IAD).
- Completed the CISI Level 2 qualification in Fundamentals of Financial Services, developing knowledge of financial markets, bonds, equities, and risk management.

University of Nottingham - BSc Computer Science (2:2)

Sep 2022 - Jul 2025

- Software in society - 77%
- Computer Security - 75%
- Computer Vision - 63%

Saffron Walden County High School

Sep 2015 - Jul 2022

- A-Levels: Mathematics (A), Computer Science (A), Spanish (A)
- 8 GCSEs including Grade 8 in Mathematics and Spanish

SKILLS & ADDITIONAL INFORMATION

Technical/Analytical: Python, R, Excel, MATLAB, Java, JavaScript

Languages: English (fluent), Spanish (fluent), French (Beginner)

Interests: Poker, geopolitics, technology, football, fitness