

## ABELARDO HERNÁNDEZ JULIÁ, CFA

### WORK EXPERIENCE

CEO & Portfolio Manager, **Soho Capital Management**, Mexico City, July 2022 to date.

- SOHO Capital Management is a regulated independent financial advisor and subsidiary of Columbus de México (managing US\$2.5bn in AUMS) focused on asset management for institutional clients via advisory, separated accounts, and mutual funds.

Head of Equities & Portfolio Manager, **Afore SURA**, Mexico City, April 2013 to July 2022.

- Head of Equities and responsible for the investment process in the asset class, which includes a global equity (country rotation) strategy, the Mexican equities portfolio, and support in direct investments in the private market
- Developed the investment philosophy and process for active equities; which is a research driven, private equity like approach, resulting in top decile risk-adjusted returns within the Mexican equities space over 10-year period
- Collaborate with other teams in scenario building, capital market assumptions, and the asset allocation decision making process in general, which is then presented in the investment committee for approval

Associate Director, Research Sales, **BBVA Bancomer**, Mexico City, September 2010 to April 2013.

- Research sales coverage for institutional clients, recommending investment ideas and providing market insight, offering cash equity, derivatives, and structured products
- Contributed to improve BBVA's ranking in equity trading volume, from 15<sup>th</sup> in 2009 to 4<sup>th</sup> in 2012, through significant improvements within our client base and expansion strategies
- Appointed as BBVA's Mexico specialist for international co-coverage efforts in Europe and LatAm

Associate Director, Equity Sales, **Bulltick Capital Markets**, Mexico City, August 2009 to August 2010.

- Research sales coverage (multi sector research & strategy) for domestic/foreign clients

Analyst, Equity Research, Mexico Strategy & Research, **UBS Pactual**, Mexico City, March to July 2009.

- Associate for Mexico Strategy team (**ranked 1<sup>st</sup> in 2009 Institutional Investor Survey**)
- Research Associate for Consumer, Retail, and Special Situations sector coverage
- Managed client relationships, including customized research requests and conference calls for UBS's top paying clients focused in Latin America

Equity Sales & Trading, **UBS Pactual**, Mexico City, January 2008 to March 2009.

- In charge of daily newspaper (Morning Headlines), compiling relevant "issuer" news from different sources, including internal research
- Assisted sales traders with orders/flow management and execution
- Produced the analysis and presentations for the launch of the market making project

Equity Research, LatAm Strategy & Product Management, **UBS Pactual**, Mexico City, June to December 2007.

- Assisted with the completion of research projects for clients
- Supported in producing internal and external strategy and management presentations

### EDUCATION

B.A., Finance, **Instituto Tecnológico y de Estudios Superiores de Monterrey**, (2004-2008)

CFA Charterholder

CESGA (ESG analyst certification from EFFAS)