

Teresa Kong

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📍 San Francisco, CA, USA

EDUCATION

Stanford University
Master of Arts
International Development Policies
1993 - 1995

Stanford University
Bachelor of Arts
Dual Major in Economics and Political
Science
1990 - 1995

Massachusetts Institute of Technology
Certificate
Cryptocurrency
2022 - 2022

ACCOMPLISHMENTS

- Veteran finance executive looking to leverage expertise in asset management, capital markets, and corporate strategy to serve on the boards of investment trusts and public / private companies. Builder of new asset classes and businesses: Launched and built an active Asia fixed income investment platform for Matthews; founded and developed the systematic fixed income emerging markets strategies for BlackRock (formerly BGI) . Domain expertise across portfolio management, research, and trading of global emerging market bonds; high yield and distressed debt and derivatives. Steered portfolios through several market cycles, including the global pandemic, global financial crisis, European banking crisis, Russia default, Asian financial crisis, and Latin American debt restructurings. Authoritative commentator across media platforms including live TV, radio, and print on Bloomberg, CNBC, Reuters, Barron's. Provider of expert testimony to Congressional committees.

PROFESSIONAL EXPERIENCE

Matthews International Capital Management

July 2010 - August 2022 (12 years 1 month)

Matthews Asia is North America's largest investment manager dedicated to Asia, with 30 year track record investing in Asia and emerging markets.

Details: Private; Investments; \$100MM - \$500MM

Head of Fixed Income, Portfolio Manager, Member of Executive Committee

July 2010 - August 2022 (12 years 1 month)

Role Description: Member of Executive Committee driving the strategic vision and business plan for Matthews. Formulated firm's expansion from Asia into Emerging Markets and from Mutual Funds to ETFs and sub-advisory businesses. Led, built, and managed fixed income investment strategies in Asia and Emerging Markets. Held responsibility for strategic direction, profitability and product design. Presented to US and Luxembourg fund boards as lead manager of funds. Led data, analytics, trading, portfolio management, risk, attribution and ESG architecture, including the first EU SFDR Article 9 compliant UCITs ESG Emerging Market Corporate Bond Fund. Frequent commentator on global macroeconomics, credit, currency and interest rates to global media outlets, including Bloomberg, CNBC, Reuters. Provide testimony on China to US Congress's US-China Economic and Security Review Commission.

Functional Experience: Strategy / Business Transformation / Corporate Development, Investments / Capital Markets, Product Oversight

BlackRock (Formerly Barclays Global Investors) , (BLK)

2002 - 2009 (7 years)

BlackRock is an American multinational investment management corporation, the world's largest asset manager, with US\$9.5 trillion in assets under management as of June 30, 2023.

Details: Public; Investments; Over \$10BN

Head of Emerging Market Investments

2002 - 2009 (7 years)

Role Description: Founded the Systematic Fixed Income Emerging Markets investment platform. Responsible for its overall strategic direction and profitability. Portfolio manager of strategies spanning the entire risk-return spectrum, including long/short, long only, and index funds. Built and managed directional and relative value strategies to deliver Libor+6-8% returns with risk budget of 6-10% of \$3bn in long/short assets. Generated 2.45% annualized alpha with an information ratio of 0.94 in a \$350m long-only emerging market bond fund. Designed stratified portfolio to minimize tracking error and transaction cost for the first emerging market bond ETF (EMB). Actively traded interest rate swaps, currency forwards, non-deliverable forwards, credit default swaps, bonds and indices across Latin America, EMEA, and Asia. Managed a team of five portfolio managers/traders in San Francisco and London. Led the development of research, trading, analytics, and attribution platform. Member of Global Fixed Income Investment Committee responsible for asset and risk allocation.

Functional Experience: Strategy / Business Transformation / Corporate Development, Investments / Capital Markets, Product Oversight, R&D

OppenheimerFunds, Inc. , (IVZ)

1999 - 2002 (3 years)

OppenheimerFunds was an US-based investment management firm that was acquired by Invesco in 2019. Invesco is an independent investment management company built to help individual investors, financial professionals, and institutions achieve their financial goals.

Details: Public; Investments; \$5BN - \$10BN

Senior Securities Analyst, High Yield Group

1999 - 2002 (3 years)

Role Description: Developed security and industry recommendations for \$6bn in US high yield credit. Applied a value-driven investment process based on fundamental analysis. Industries covered include media, cable, financials, healthcare, consumer and power/utilities. Served as lead investor in negotiating terms and covenants on behalf of creditors in several financial restructurings. Structured OppenheimerFunds' first Collateralized Debt Obligation (CDO). Winner of the 2000 Spiro Award for outstanding effort and exemplifying OppenheimerFunds' Statement of Shared Values.

Functional Experience: Marketing, Strategy / Business Transformation / Corporate Development, Investments / Capital Markets, Product Oversight

JP Morgan

1995 - 1999 (4 years)

JPMorgan Chase & Co. is an American multinational investment bank and financial services holding company headquartered in New York City and incorporated in Delaware.

Details: Private; Banking, Investments; Over \$10BN

Associate, Latin America Capital Markets, Emerging Markets Sales, Trading and Research

1995 - 1999 (4 years)

Role Description: Member of the number one ranked Latin America Capital Markets team. Designed and presented financing and risk management solutions including bond issuance, swaps, buybacks, interest rate options and credit-linked notes for Latin American and Asian sovereigns and corporate issuers. Structured securitizations of oil receivables, dual-currency notes to enable borrowers to access lower cost financing. Coordinated with syndicate, investment banking, research, sales and trading. Responsible for training new associates and analysts. Promoted to Associate after one year as Analyst.

Functional Experience: Strategy / Business Transformation / Corporate Development, Investments / Capital Markets

The World Bank

June 1994 - September 1994 (3 months)

With 189 member countries, staff from more than 170 countries, and offices in over 130 locations, the World Bank Group is a unique global partnership: five institutions working for sustainable solutions that reduce poverty and build shared prosperity in developing countries.

Details: Public; Banking, Investments, BioPharma, Healthcare Services, Medical Products, Materials: Chemicals, Agricultural, etc., Energy, Environmental & Utilities, Transportation; Over \$10BN

Project Assistant

June 1994 - September 1994 (3 months)

Role Description: Assessed the competitiveness of Morocco's export industries for Moroccan Ministry of Finance and Trade. Examined market shares, degree of processing, linkages between industries, and balance of trade.

Functional Experience: Strategy / Business Transformation / Corporate Development, Investments / Capital Markets

BOARD EXPERIENCE

Delphia Technology Holdings

2022 - Present

Independent Director

Details: Private; Investments, Software / Service; Under \$100MM

Delphia is an investment advisor that lets people invest in the capital market by contributing their data. Delphia uses machine learning and data science to study the collective personal data shared by its members to make smart investment decisions with renewable investment capital – helping users get paid for the data they're already creating.

Village Hilltop Foundation

August 2022 - Present

Secretary of the Board

Details: Non-Profit; All Non-Profit; Under \$100MM

Village Hilltop Foundation is working to create new pathways to building an agricultural community cooperative for underserved urban populations. We collaborate with academic institutions and organizations to build solutions for the urban food ecosystem, addressing the challenges of food deserts and the impacts of climate change on the food supply chain through innovative vertical farming.

Prospect Sierra School

2021 - Present

Chair of the Investment Committee

Committee: Finance

Details: Non-Profit; All Non-Profit; Under \$100MM

Prospect Sierra School is an independent school based serving TK-8th grade students based in the San Francisco Bay Area.

Bretton-Woods Committee

2021 - Present

Future of Finance Working Group

Details: Non-Profit; All Non-Profit; Under \$100MM

The Bretton Woods Committee is the preeminent non-profit organization dedicated to effective global economic and financial cooperation. Towards this end, we demonstrate the value of multilateralism and improve the performance of the international financial institutions (IFIs) through public dialogue, advocacy, and policy analysis.