

APAC South

Candidate: Simon Ng



Nomination Packet, PCR, APAC South

Statement of Qualifications and Intention

I am honored to put forward my candidacy for the role of Presidents Council Representative for APAC South for the upcoming term.

With nearly three decades of experience in quantitative investing and wealth management, I have held senior leadership roles across the region, including Asia Pacific Deputy CIO at AXA Investment Managers, CEO of RHB Asset Management, and CEO of CIC International (Singapore). I am currently a founding partner of Peak Capital Management, where I continue to apply systematic, data-driven investment strategies in alternative investments.

Beyond my professional career, I am deeply committed to the CFA community and industry development. I served as President of CFA Society Singapore between 2021 and 2025, Deputy President for two years prior to that, and am a co-convenor of the IBF Fellow with Singapore Institute of Banking and Finance. I also contribute to education as an adjunct lecturer at Singapore Management University and the Singapore University of Social Sciences. I earned my MBA from the University of Chicago Booth School of Business.

My intention in seeking this role is to represent the voices of APAC South members, strengthen collaboration across societies, and support initiatives that enhance member value and regional impact. I am committed to fostering open dialogue, sharing best



practices, and strengthening connections between local societies and the global organization.

I would be honored to serve and contribute to the continued success of the Presidents Council and the broader CFA community.

Sincerely,

Simon Ng, CFA

Chief Executive Officer, Peak Capital Management Pte. Ltd.
Immediate Past President, CFA Society Singapore

[Vision for PCR Term](#)

As CFA Presidents Council Representative for APAC South, my vision over the next two years is to strengthen collaboration, representation, and professional impact across the region. APAC South encompasses diverse markets with societies at different stages of development, and I believe we can harness our collective strengths through deeper engagement, knowledge sharing, and coordinated initiatives that support both our members and the broader investment profession.

One of my key priorities is to enhance collaboration among societies in the region. Many societies have developed strong initiatives in areas such as professional education, member engagement, advocacy, and university outreach. I hope to facilitate more structured opportunities for societies to exchange best practices and share successful programmes. For example, in Singapore, we worked closely with the relevant accreditation body to advance the recognition of the CFA Level I programme. Through coordination with the CFA Institute team and guidance provided by CFA Society Singapore, we were able to support the accreditation process and strengthen the programme's alignment with industry standards. Experiences like this can provide useful insights for other societies exploring similar collaborations with regulators, accreditation bodies, or educational institutions.

Promoting continuous learning will also be an important focus. Many societies across the region have developed high-quality curriculum, professional development programmes, and thought leadership initiatives. I would like to encourage the sharing of these resources across societies so that successful learning frameworks and industry insights can be adapted and implemented more widely.

In addition, I hope to encourage collaboration on regional webinars and thought leadership events on emerging topics such as sustainable investing, digital transformation, and evolving market practices.



Ultimately, my goal is to serve as a connector and advocate for APAC South societies, helping them collaborate more effectively, share knowledge more widely, and strengthen the value and impact of the CFA community across the region.

Simon Ng, CFA

Letter of Reference

I am writing to recommend Simon Ng for the role of CFA Presidents Council Representative, based on his longstanding contributions to CFA Society Singapore (“CFAS”) and to the wider investment profession.

Simon has been an active volunteer with CFAS since 2013 and has taken on a broad range of leadership roles over the years, including Chair of the University Outreach Committee (2016), Secretary (2017), Deputy President (2018), and President (2021). Through these positions, he has helped strengthen CFAS’ governance, member engagement, and outreach efforts. His consistent willingness to step forward and assume responsibility reflects a genuine commitment to the Society’s mission and its members.

Beyond organisational leadership, Simon has contributed meaningfully to CFAS’ advocacy and public education initiatives. His involvement in the “Save and Invest Portfolio Series,” developed in partnership with the Monetary Authority of Singapore and the Singapore Exchange, enabled him to engage directly with a wide audience of retail investors. Over several years, he delivered recurring presentations and provided accessible investment commentary in local media. His work in these initiatives demonstrates his ability to communicate complex topics in a clear and practical way, and his steady engagement has helped reinforce public trust in the investment profession.

Simon has also supported CFAS’ ethics-focused initiatives, including the CFAS Ethics Challenge for university students and the Ethics Workshop for investment professionals launched in 2019. His participation in these programmes, alongside his involvement as a judge for the CFA Institute University Research Challenge Regional Finals and his service on the CFA Institute Market Council (2016–2018), shows his consistent advocacy for professionalism and ethical standards. He has long been someone who encourages others—students, young professionals, and peers—to consider the importance of ethics as part of their long-term development.

In addition, Simon played a part in the Singapore launch of the CFA Institute Diversity, Equity, and Inclusion (DEI) Code in October 2024. His involvement supported CFAS’ efforts to broaden awareness of DEI principles within the investment profession. He also contributed to the successful accreditation of the CFA Level 1 programme with the Institute of Banking and Finance (IBF), working with both CFA Institute and CFAS teams to ensure alignment with industry standards.



Professionally, Simon has accumulated more than 25 years of experience in fund management, including serving as CEO of two investment firms. Across these roles, he has consistently promoted the CFA Code of Ethics and Standards of Professional Conduct and supported the adoption of the Global Investment Performance Standards (GIPS). His leadership style has always been grounded in professionalism, accountability, and a genuine interest in developing people and raising organisational standards.

Having worked with Simon and observed his approach to leadership, I have found him to be thoughtful, steady, and committed to achieving outcomes that benefit the broader community. He consistently takes a long-term view, and he approaches his responsibilities with a quiet confidence that earns the respect of those around him. These qualities, combined with his extensive experience within CFAS and his continued dedication to the CFA Institute's values, make him a strong candidate for CFA Presidents Council Representative.

I support Simon Ng's nomination for consideration. Please feel free to contact me if further information is required.

Sincerely,

Keoy Soo Earn
Advisory Council Member, CFA Society Singapore

[Nominator](#)

Nomination submitted by Gerard Lee, CFA.

[Video](#)

<https://www.dropbox.com/scl/fi/0jhz28cyly0b2irer1qtg/Video-Simon-Ng-candidacy-for-PCR.mp4?rlkey=vshvg9b5p7tuqwo7e9bjxcl7l&st=3q0uvbu4&dl=0>