

**Profile: Joycelyn Ong**

As a transformative and visionary leader, I have consistently driven business and revenue growth across various market cycles. My successful track record includes the establishment of new business verticals across diverse geographies and client segments. I have led high-performing teams in highly competitive industries and am currently spearheading a multidisciplinary team to stimulate growth and business expansion.

In addition to my professional achievements, I am active in the non-profit sector. I am passionate about improving people's lives and having a positive impact on society

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Board of Director, Family Office and Non-Profit Organisations

Temasek Trust [Temasek Trust](#)

Singapore

May 2024 – Dec 2024 Advisor – Co-Axis

MARYMOUNT CENTRE [Marymount Centre \(marymountctr.org.sg\)](#)

Singapore

Sep 2016 – Dec 2024 Board member

RCL PARTNERS [Home](#) | [RCL Partners](#)

London, United Kingdom

Oct 2020 – Dec 2024 Director – Richardson Family Office

ORDER of Friars Minor (OFM)

Rome, Italy

June 2023 – June 2026 President, Investment Review Commission

IMMACULATE HEART MISSION (IHM)

Rome, Italy

June 2018 – Dec 2024 Member of the investment management committee

Professional Experience

ShawKwei & Partners [ShawKwei & Partners - ShawKwei & Partners](#)

Singapore

April 2024 – Current: Managing Director

Primary responsibilities:

- Value creation (portfolio companies):
 - Developing new business verticals in energy transition and clean energy
- Sustainability and ESG reporting
- Investor Relations

ADDX PTE. LTD [Invest in Private Markets \(addx.co\)](#)

Singapore

June 2023-February 2024: Head of Global Markets, member of the management committee

Primary responsibilities:

- Leading the Exchange business to operating profitability through:
 - **Origination:** continue to build the alternatives shelf with new categories, industry leading managers, thematic managers and advised solutions
 - **Listing and issuer services** - shortened origination and listing process through optimized listing structures, legal and technological innovation to attract a larger pool of issuers
 - **Differentiated pricing strategies** - expansion of institutional participation and trading velocity
- Management of budgets and providing regular updates to CEO, BOD and other Stakeholders

Jan 2022-May 2023: Head of Growth, member of management committee

Oct 2020 - Dec 2021: Head of Capital Markets

Primary responsibilities:

- Develop and execute growth strategies including increasing revenues, acquisition and activation of investors, attracting top issuers and participating in development partnerships
- Leading cross-functional teams to alignment and achieve growth goals – Single North Star.
- Utilize data to conduct market analysis on trends, investor behaviour and new growth opportunities
- Balance sheet liquidity management and managing budgets and resources
- Provide regular business updates to the CEO, board of directors (BOD), and other stakeholders

Significant achievements to date: (1) Originated and built a diversified investment shelf consisting of 5 categories and > 30 different issuers (2) Completed transaction notional of approximately USD 1 billion (3) Technological, financial and legal innovation for the creation of native and hybrid types of digital assets and life-cycle management for Alternative investment products

Credit Suisse AG – Private Wealth Management

Singapore

Jan 2019 – Oct 2020: **Head of Expert Relationship Management Team***Primary responsibilities:*

- **Entrepreneur client management:** Strategic advisor to entrepreneurs in the region with a focus on the following sectors: Consumer, Fintech, Healthcare, Real Estate and Start-ups

UBS AG – Global Family Office (GFO)

Singapore

Jun 2014 – Jan 2019: **Executive Director and founding member of GFO coverage team for SEA***Primary responsibilities:*

- **Billionaire client management:** Strategic banker to over a dozen Billionaire clients in Southeast Asia to provide holistic and innovative solutions for their corporations, family offices and charitable foundations.
- **Areas of focus:**
 - Family backed public listed corporations - financing and acquisition strategies
 - Family offices – strategic stake acquisitions, investment management, public markets execution
 - Private markets – direct investments, venture capital and private equity investments
- **Significant achievements:** (1) Doubling of AUM (annually) and double digit increase in clients' share of wallet (2) Increasing ROI for clients largely through increase in allocation in private markets and investment management (3) By Dec 2018, was managing > USD 3 billion in assets

MORGAN STANLEY

Singapore/Hong Kong

Jan 2009 – June 2014: **Executive Director – Institutional Equities Division***Primary responsibilities:*

- **Client management:**
 - Fund managers: Cornerstone/anchor participation in IPOs and new issues, corporate access, research and seamless execution
 - Family offices: asset allocation, direct investments (Pre-IPOs and co-investments), investments in private equity, real estate and hedge funds
- **Resources management:** to ensure that Return on Equity (ROE) is above that of the industry benchmark when managing client relationships versus capital/resource utilization and risk mitigation.
- **Significant achievements:** (1) Doubled assets under management (AUM) annually. (2) Increasing the number and types of financial solutions utilized by our clients, hence increasing ROE (3) Received award for the highest revenues generated in fixed income derivative solutions for 2013

May 2007- Dec 2008: **Executive Director – head of GWM capital markets, APAC**

Singapore/Hong Kong

Primary responsibilities:

- Managing a business with revenues of > USD 100MM across all asset classes and a high-performance team of 10 people

Royal Bank of Scotland

Singapore

Aug 2005 – May 2007: **Senior Director – head of derivative sales, Southeast Asia (SEA)***Primary responsibilities:*

- **Sales and marketing strategy and execution:** Built and implemented a strategy to establish RBS as a leading derivative house in SEA. Led a team of 5.
- **Significant achievements:** (1) doubled revenues in < 2 years (2) established RBS as a derivative house in the region through winning large competitive mandates in the region (3) re-tooled and upgraded team

UBS AG

Singapore

Sep 2003 – Aug 2005: **Director, Derivative Sales APAC, Fixed Income***Primary responsibility:*

- Structuring and sales of fixed income and hybrid derivative products to financial institutions in APAC
- **Significant achievements:** (1) Record revenue (> USD 15MM) generated with product innovation through wealth management, insurance and bank channels (2) Secondment to UBS Taiwan for 3 months to set up the onshore fixed income department

MORGAN STANLEY

Hong Kong

Sep 2000 – Sep 2003: **Vice President, Derivative Products, Fixed Income – Investment Banking JV***Primary responsibilities:*

- **Established and led the derivative structuring business for APAC:** (1) establish the local currency derivative business (2) Set up joint-venture between Fixed Income and Investment Banking divisions
- **Significant achievements:** (1) Significantly increased revenue per client due to the successful implementation of the JV – IB clients had access to a one stop solution from investment banking and treasury (2) pioneered local currency derivative solutions at MS and was able to capitalize and dominate the market with record revenues in both yield enhancement and hedging solutions (3) Secondment to Morgan Stanley Japan to driving hedging solutions for Japanese corporations

STANDARD CHARTERED BANK

Singapore

Nov 1998 – Jul 2000: **Senior Manager, Asian Currency Debt Securities (ACDS)***Primary responsibilities:*

- **New business set-up and implementation:** Setting up the Asian currency fixed income business in five countries in Asia. This covers all aspects of the business and consists of regulatory approvals operations, risk control, sales and trading
- **Significant achievement:** the business was operational in 5 countries and PBT positive within 12 months

1996 – 1998 MERRILL LYNCH - Analyst Program, Fixed Income Trading

Sydney, Australia

Education**INSEAD – INTERNATIONAL DIRECTOR'S PROGRAM**

Singapore and Fontainebleau

Commenced in June 2024 and complete in December 2024

BCG U – GREEN ECONOMY FOR SENIOR LEADERS

Singapore

April - June 2024 Completed 8 week training program

NATIONAL UNIVERSITY OF SINGAPORE – REGULATORY AFFAIRS PROFESSIONAL SOCIETY

Aug 2017 Graduate Certificate – Medical Device Regulatory Affairs (Top 3 in my cohort)

SINGAPORE -STANFORD BIODESIGN

Singapore

Aug-Nov 2016 Completed Biodesign Innovation class

Intensive 14-week didactic training program on the process of innovating medical technologies

STANFORD BUSINESS SCHOOL – May 2014 Executive program for women leaders

California, USA

HARVARD BUSINESS SCHOOL– April 2014 A new path, setting new professional directions

Boston, USA

ROYAL MELBOURNE INSTITUTE OF TECHNOLOGY

Melbourne, Australia

'1995 - '1996 Masters of Finance, Scholarship for an Outstanding Student (top 1% of class).

MONASH UNIVERSITY

Melbourne, Australia

'1992 - '1994 Bachelor of Commerce (Accounting and Finance Major).

CPA Australia

Melbourne, Australia

Qualified CPA since 2002