

This Guy

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PROFESSIONAL EXPERIENCE

Big 3 Credit Rating Agency

New York, NY

Research Assistant – Financial Institutions Group

July 2013 – Present

- Performed strategic credit analysis to calculate inherent risk of both large and mid-cap companies; provided analytical support to primary analysts through shadow coverage of 26 credits
- Constructed multiple analytical models for 15 new debt issuances totaling \$4.9 billion; stress and scenario analyses effectively demonstrated potential risks with each issuance
- Researched industry trends and wrote sections of 10 publicly disseminated company and industry research reports on behalf of the Financial Institutions group
- Spearheaded an initiative to efficiently screen over 300 bank credit prospects using ratio analysis to streamline the regional bank prospecting effort; resulted in meetings with over 15 targeted prospects
- Developed rating recommendations utilizing information from services such as Bloomberg and correspondence with clients' senior management teams; consolidated information and presented assessment of companies' short term business prospects in ratings committees
- Assisted in the creation of an information aggregation portal website for the Global Credit Committee for upper management; received ACE award as a recognition of achievement
- Managed team of 4 India-based analysts, and developed quality control framework for offshore analytical support team

Well Known Hedge Fund

Stamford, CT

Finance Administrator – Portfolio Management, Reporting & Analysis

October 2011 – July 2013

- Applied risk analytics to portfolio managers' trades and generated detailed reports for C-level executives; analysis resulted in approximately \$1.9 MM in avoided expenses for the firm
- Led 4 junior analysts through initiative to determine individual portfolio profitability through complex financial models; made recommendations based on findings to improve bottom-line financial results
- Analyzed trading data for 130+ portfolios with individual AUM of \$100MM to \$3B; reports were distributed to upper management to assist with the evaluation of business decisions
- Modeled and pitched economic structures for the implementation of the firm's new directional fund; structure selected minimized overall netting risk exposure and avoided potential losses of \$250K
- Ensured portfolio managers were operating within their required liquidity thresholds; violations were reported to senior management and appropriately adjusted in the portfolio to circumvent extensive losses
- Managed the budgets for 27 quantitative portfolio managers' technology and market data expenses; budgets ranged from \$150K to \$2.5MM and reduced excess expenditures by 13%

EDUCATION & QUALIFICATIONS

Non-Target

Somewhere, NY

Bachelor of Business Administration in Finance

Graduation Date – May 2011

- **Minor:** Information Technology
- **Academic Honors:** Dean's List, Presidential Scholarship (\$50,000 over 4 years)
- **CFA Institute:** Level I CFA Candidate (June 2014)

SKILLS & INTERESTS

Financial Programs: Bloomberg, S&P Capital IQ, Morningstar, Advent Portfolio Exchange

Programming Languages: VBA, Java, JavaScript, HTML

Interests/Activities: Skiing, Traveling, Intramural Sports: Flag Football, Basketball, Soccer