ROBERT SMITH

Equity Research Analyst

Phone: (0123)-456-789 | Email: info@qwikresume.com | Website: Qwikresume.com

SUMMARY

Strategic and analytical finance professional with 5 years of quality experience in fixed income, equity research, quantitative analysis and financial risk management. Result orientated and accomplished professional who consistently meets deadlines and increases company revenue. Skilled at increasing productivity through planning and adopting new technologies. Thrives in high-pressure environments.

CORE COMPETENCIES

Business Development, Corporate Finance, Equity Research, Equity Research, Asset Based Lending.

PROFESSIONAL EXPERIENCE

Equity Research Analyst
ABC Corporation - January 2013 – May 2014

Key Deliverables:

- Managed Panther Value Fund and Milwaukee Growth Fund.
- Advised Global Fund that has exposure to global bonds, international equity, and special situations (commodities, etc.).
- Worked closely with the Investment Working Board and other professionals, discussing investment philosophy and process for investing, performance, proposed asset allocation, decision-making process and team makeup, and initial strategy.
- Reviewed performance and portfolio evolution for the board.
- Identified differentiated investment ideas (in the energy, materials and auto sectors) through deep fundamental analysis and extensive engagement with company managements, industry experts and buy side / sell side contacts.
- Collaborated in portfolio construction process by calibrating macro, sector/secular and individual security outlook to achieve optimal positioning.
- Collaborated extensively with investment professionals throughout Wellington, sharing/debating investment ideas and mentoring less experienced investors.

Equity Research Analyst
ABC Corporation - 2010 – 2013

Key Deliverables:

- Assisted in evaluation of current and prospective investments in U.S.
- stocks, mutual funds and closed-end funds Prepared investment recommendations for assigned companies, mostly using multiple analysis and Bloomberg .
- Worked directly with the firms CFO to evaluate and model 50+ publicly traded companies from 4 industries Created valuation spreadsheets for assigned .

2259 Oak Street, Old Forge, New York, 13420
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- Ranked #1 Oil Services Analyst (for stock picks) by Wall Street Journal (Best on the Street) in 2005.
- Led energy research effort at boutique research firm specializing in small/mid cap equities.
- Developed energy macro outlook/strategy, published differentiated research on under appreciated stocks and marketed these ideas to a wide array of .
- Consistently ranked one of the top analysts in the firm based on internal rankings and client feedback.

EDUCATION

MBA in Business Administration - (Lubar Business School, University of Wisconsin - Milwaukee, WI)

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