

Objective

Equity Research Associate with 2 years of experience in Performing equity research by applying models in a cross-sectional scenarios and valuating two Internet companies through times series projection, etc.

Skills

Microsoft Excel, Financial Skills, Coordinating Skills.

Work Experience

Equity Research Associate

Evercore ISI - July 2014 – 2014

- Supported research production by building and maintaining financial models, monitoring and interpreting economic data, and evaluating the quality (relative valuation, multiples analysis) of 14 equities under coverage.
- Responsible for co-authoring a weekly equity & credit default swap review and monthly housing-related economic notes.
- Developed statistical forecasting models on EViews to estimate macro-level housing trends and support ongoing investment theses.
- Performed high functioning operational and Excel tasks.
- Integrated the financial models and valuation tools of two equities under coverage post-M&A activity.
- Led and successfully executed the transition from Bloombergs to FactSets API on all Excel models after the firm-wide policy change.
- Responsible for the design and preparation of analyst marketing materials.

Equity Research Associate

Delta Corporation - 2009 – 2014

- Investment management and equity research firm.
- Assisted senior health care analyst who was ranked #1 in annual Institutional Investor rankings for 17 years.
- Provided senior research coverage on long term care, post-acute care, physician practice management, rehabilitation, and drug distribution, covering.
- Worked directly for the Senior Telecommunications Services Analyst.
- Created and maintained all models and industry databases.
- Wrote all morning notes and company research reports.
- Performed numerous valuations on public companies (peer comparables, DCF, NAV, sum of parts) Modeled financial projections based on company income.

Education

G.E.D