



# DEGROOTE FINANCE & INVESTMENT COUNCIL

Resume Book



McMaster University

2022 - 2023



# DEGROOTE FINANCE & INVESTMENT COUNCIL

Executive Team

# Kayden Hudda

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## EDUCATION

### McMaster University – DeGroote School of Business

Hamilton, ON

*Honours Bachelor of Commerce (Finance) & Honours Bachelor of Science (Math and Computer Science)*

*Expected Graduation 2024*

- **Academics:** Cumulative GPA: 3.5/4.0; Finance GPA: 3.7/4.0
- **Awards:** 1<sup>st</sup> in ACIIC Short Pitch Competition, Finalist at KPMG Ideation Challenge, and 1<sup>st</sup> in AmplifyME Sell-Side Simulation
- **Coursework:** Portfolio Management (A), Financial Modeling (A-), Principles of Programming (A+), and Probability Theory (A)

## PROFESSIONAL EXPERIENCE

### RBC Capital Markets

Toronto, ON

*Global Markets Summer Analyst, Equity Research (Precious Metals & Mining)*

*May 2022 – August 2022*

- Supported the team with an initiation of a new company, determining the NAV of assets, conducting initial research, forecasting mine outputs, creating theses, and developing a company operating model to assist in the construction of a report
- Collected key data for the development of an ESG report which aims to monitor mining companies sustainability plans and targets
- Summarized earnings call data and refreshed model forecasts to help Analysts update our clients on positive or negative sentiment
- Conducted fundamental research on 30+ mining companies and created a comparable company analysis using common industry multiples, which helped to determine a relative value for companies in our coverage and other firms in the space

### Bank of Nova Scotia

Toronto, ON

*Sales & Trading Analyst, Fixed Income Derivative Solutions*

*December 2021 – April 2022*

- Researched and created several client presentations on topics including U.S. CPI Market, Swaps, ETFs, and Equity Linked PPNs
- Wrote insightful commentary covering structured products and fixed income markets which was distributed to 50+ clients
- Utilized VBA to sort and aggregate bond data based on various parameters, helping to automate and improve pricing efficiency
- Assisted in creating a pricing model for callable notes utilizing Bloomberg macros and Excel to ensure clients had accurate figures
- Managed the team's SQL database, frequently debugging errors, extracting spreads data, and creating data visuals using Python
- Analyzed prospective client financial statements and summarized key information to assist in determining potential product needs
- Redesigned desk tasks using Python to streamline routine processes such as client emails, scraping data, and report generation

### Equitable Bank

Toronto, ON

*Treasury Intern, Liquidity Risk Management*

*May 2021 – December 2021*

- Designed a new statistical model and created SQL queries to extract historical data for backtesting to anticipate consumer runoff which helped ensure EQ Bank was prepared for stress situations
- Modelled regression in R and MATLAB to observe customer trends such as frequency of deposits and product-specific outflows
- Conducted research using numerous academic papers to ascertain a suitable method for predicting the most optimal liquidity rate
- Developed a GIC predictor model using Python (Pandas, Matplotlib, TensorFlow, and NumPy) to anticipate daily deposit volumes based on market volatility and competitor rate changes
- Automated EQ Bank's GIC dashboard using VBA and SQL to accurately display CANNEX data and EQ daily volume changes

## LEADERSHIP EXPERIENCE

### DeGroote Finance & Investment Council (DFIC)

Hamilton, ON

*President & Founder of Quant Group, Previously: Vice President, Senior Analyst (TMT), Analyst (DIG)*

*March 2020 – Present*

- Managed McMaster's largest undergraduate club and provided oversight for DFIC's \$100k Balanced Fund from Fidelity Canada
- Pitched 4 North American equities utilizing fundamental investment philosophy by building models including a discounted cash flow analysis, precedent transaction, and comparable company analyses to create value-focused investments
- Founded a quantitative research team focused on developing algorithms for global macro and cross-asset arbitrage strategies
- Built an investment tracker dashboard using React which displayed metrics including annual returns, Sharpe ratio, and correlation

### Association of Canadian Intercollegiate Investment Clubs (ACIIC)

Hamilton, ON

*McMaster Chapter Head, Previously: Analyst*

*March 2020 – Present*

- Led a team of 6 analysts through an intercollegiate stock pitch competition, industry primer development, and LBO competition
- Utilized Capital IQ for a pitch on Maxar Technologies Inc. (TSE: MAXR) with a target price of \$42.53 and a 49% implied upside
- Collaborated with fellow analysts to create a short pitch on Sealed Air (NYSE: SEE), developing several theses including concerning underlying fundamentals, questionable accounting practices, and intensifying secular headwinds with the pitch placing 1<sup>st</sup> out of 12

## ADDITIONAL INFORMATION

- **Technology:** Python · Java · SQL · R · Excel/VBA · HTML/CSS · React · Bloomberg · Capital IQ · FactSet
- **Other Awards:** 1<sup>st</sup> in EQ Bank Case Competition (\$1500), McMaster Scholarship (\$1000), and 3<sup>rd</sup> in Mac DECA U Accounting
- **Interests:** Skiing, Genealogy, History (Early & Late Middle Ages), Drumming (Soca & Classic Rock), and Machine Learning

# Meaghan Moore

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## EDUCATION

### McMaster University – DeGroote School of Business

*Honours Bachelor of Commerce, Area of Focus: Finance*

**Hamilton, ON**

*Expected Graduation 2023*

- **Academics:** Cumulative GPA of 3.8/4.0
- **Awards:** Deans' Honour List (2019 – 2021), McMaster Entrance Award (\$2,000)
- **Relevant Coursework:** Financial Modeling (A+), Intermediate Financial Accounting (A+), Securities Analysis (A+)

## PROFESSIONAL EXPERIENCE

### CIBC Capital Markets

*Investment Banking Summer Analyst*

**Toronto, ON**

*May 2022 – Present*

- Completing a four-month internship on the Consumer, Industrials & Telecommunications team

### CIBC Asset Management

*Summer Analyst, Equity Research and Portfolio Management*

**Toronto, ON**

*May 2021 – August 2021*

- Created financial models for various consumer and real estate companies to provide a rational thesis and useful target price for each
- Utilized Bloomberg to analyze rolling average interest rates to test a thesis on Toronto-Dominion Bank relating to rising interest rates, which resulted in an unexpected conclusion that helped the financials analyst improve their thesis on the bank
- Led ESG efforts through holding meetings with sector analysts, analyzing company sustainability reports, scoring companies on an ESG basis, and organizing data in excel using VLOOKUP to provide a thorough ESG rating for each company covered

### Citi

*Early ID Women's Leadership Program*

**Virtual**

*February 2021*

- Participated in training initiatives provided by Fitch Learning on financial analysis, valuation, and critical thinking
- Engaged with a mentor in investment banking for five weeks of touchpoints to receive personalized guidance and improve upon technical and interpersonal skills

### DeGroote School of Business

*Trading Floor Coordinator*

**Hamilton, ON**

*September 2020 – Present*

- Supervised and aided students with operating Bloomberg and Reuters Eikon for research and personal curiosity

### CIBC

*Summer Finance Intern, Shareholder Reporting*

**Toronto, ON**

*May 2020 – August 2020*

- Preparation of two quarterly and one annual financial report, ensuring that they were free of error when reporting to stakeholders
- Collected data on subsidiaries, and rolled-forward the financial statements and notes to the subsequent year
- Analyzed the climate-related financial disclosure (TCFD) reports of competitors to benchmark environmental risk

## LEADERSHIP EXPERIENCE

### DeGroote Finance and Investment Council

*Vice President, Investment Council*

**Hamilton, ON**

*May 2022 – Present*

*Portfolio Manager, Financial Institutions*

*January 2021 – May 2022*

*Analyst, Financial Institutions*

*September 2019 – January 2021*

- Built valuation models including DCF and comparable company analysis to make value-focused investments
- Led a team of six analysts using strong leadership, teamwork, and communication skills
- Used Refinitiv and Bloomberg for financial modeling, valuation, and to monitor market activities to develop and support theses

### ACIIC

*Investment Analyst*

**Hamilton, ON**

*October 2020 – April 2021*

- Utilized Refinitiv to pull and manipulate data in Microsoft Excel to pitch Maxar Technologies Inc. to industry professionals
- Conducted financial modeling, analysis, and valuation of companies to collaboratively determine the best ideas

## ADDITIONAL INFORMATION

- **Languages:** Written and spoken French (DELF B2)
- **Finance:** Bridge to Capital Markets Delegate, Women in Capital Markets Mentorship Program, Canadian Securities Course
- **Wall Street Prep:** 3 Day Financial & Valuation Bootcamp (FSM, DCF, M&A, LBO), Bank & FIG modeling
- **Software:** Experience with Refinitiv Eikon, Bloomberg (BMC Course), Microsoft Office (Excel, PowerPoint), FactSet
- **Interests:** Paddle boarding, skiing, photography, fitness, graphic design, sailing

# Mitchel Clarence Smith

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## EDUCATION

### McMaster University – DeGroote School of Business

**Hamilton, ON**

*Honours Bachelor of Commerce, Area of Focus: Finance*

*Expected Graduation April 2023*

- **Academics:** Cumulative GPA of 3.8/4.0
- **Awards:** Deans' Honour List (2018 – 2021), KPMG scholarship (\$1500), Golden Key (top 15% of class)
- **Coursework:** Calculus 1(A+), Finance 1 & 2 (A+), Accounting 1 & 2 (A+), Alt Investments & Portfolio Management (A+)
- **Volunteering:** 24-hour case volunteer

## PROFESSIONAL EXPERIENCE

### TD Securities

**Toronto, ON**

*Sales & Trading Summer Associate, Notes Structuring*

*May 2022 – Present*

- Currently completing a four-month internship on the structured notes desk
- Sat with other desks to develop a holistic view of how different desks interact with each other
- Developing an understanding of how to create different structures by packaging together different derivatives
- Used SQL to query databases to efficiently find data
- Updated our competitor pricing models which looks how our competitors are pricing comparable notes allowing us to see where we are competitive and what structures competitors are offering
- In the process of creating a python script to automate a current routine weekly task
- Converting legacy spreadsheet-based sales and reporting tools to Tableau
- Currently a volunteer for TD's 25<sup>th</sup> Underwriting Hope Charity Auction which seeks to raise funds for multiple children's charities throughout the country

### Bank of America Securities

**Toronto, ON**

*Junior Research Analyst, Metals & Mining*

*May 2021 – April 2022*

- Worked on a \$250M IPO and subsequently assisted in initiating coverage on the stock
- Updated financial models for guidance and added quarters to models for upcoming fiscal years
- Contributed to writing and preparing thematic research on large cap precious and base metals stocks
- Interacted with external and internal stakeholders to service data request for our coverage cluster
- Created and presented a merger arbitrage pitch on Activision Blizzard (ATVI) to the COO and other senior leaders
- Utilized bank resources to learn about different sectors and topics outside my coverage area
- Collected, analyzed, and interpreted large data sets to develop conclusions on the coverage cluster

## LEADERSHIP EXPERIENCE

### DeGroote Finance and Investment Council

**Hamilton, ON**

*Vice President, Investment Council*

*May 2022 – Present*

*Senior Analyst, Real Estate*

*September 2020 – April 2021*

- Built a three-statement financial model of First Capital REIT (FCR.UN)
- Utilized industry-specific valuation techniques for real estate assets to help provide more reliable equity valuations through accurate analysis of free cash flow and net asset value
- Worked in a team to create well formatted professional PowerPoint decks and presented them to a group of industry professionals
- Interacted with industry professionals from multiple disciplines within finance

### Lexingworth Capital

**Hamilton, ON**

*Associate, Financial Institutions Group*

*March 2020 – October 2020*

- Conducted discounted cash flow, comparable, and precedent transaction valuations on equity securities
- Worked with a peer to create and present a stock pitch to over 25 club members
- Used appropriate valuation techniques such as free cash flow to equity and dividend discount models for banks resulting in a realistic estimate of value

## ADDITIONAL INFORMATION

- **Books:** Security Analysis, Big Debt Crises, The Changing World Order, and Moneyball
- **Podcasts:** RBC Markets in Motion, Morgan Stanley's Thoughts on the Market, and Exchanges at Goldman Sachs
- **Marquee Group:** Completed courses in DCF valuation, Financial Modeling, Python Fundamentals, and Applied Machine Learning
- **Software:** Advanced proficiency in Microsoft Office, moderate proficiency in Tableau, SQL, and Python
- **Interests:** Strength training, Advanced analytics in sports, Coding, Reading, and Personal investing

# Lucas D. Martin

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## EDUCATION

### McMaster University – DeGroote School of Business

*Honours Bachelor of Commerce; Double Minor in Economics & Innovation*

**Hamilton, ON**

*Expected Graduation: April 2024*

- **Academics:** Cumulative GPA: 3.9/4.0
- **Awards:** McMaster Entrance Scholarship, Dean's Honour List (2020-2022), Golden Key (Top 15% of Class)
- **Coursework:** Managerial Finance, Managerial Accounting, Intermediate Economics, Data Analytics, and Calculus

### École des Hautes Études Commerciales du Nord – EDHEC Business School

*International Bachelor of Business Administration; McMaster Exchange Program*

**Lille, FR**

*January 2023 – April 2023*

- **Academics:** Outbound exchange student, scheduled to complete a semester-long exchange term in Lille, France
- **Awards:** Scotiabank Commerce Exchange Award (Scholarship)

## PROFESSIONAL EXPERIENCE

### Business Development Bank of Canada (BDC)

*Summer Analyst, Financing & Business Development*

**Hamilton, ON**

*May 2022 – August 2022*

- Significant client-facing exposure to identify and grow existing profitable businesses with revenues of \$1MM – \$50MM
- Assisted in executing the loan origination process, including ordering credit reports and insurance information
- Worked extensively with small to large sized enterprises to provide working capital and equipment financing
- Responsible for and involved in all phases of the commercial lending process to execute daily operations in strict accordance with bank policies, procedures, and regulations

### Loblaw Companies Limited

*E-commerce Supervisor, Previously: E-commerce Clerk*

**Burlington, ON**

*November 2018 – April 2022*

- Consistently supervised a team to effectively manage the flow of over 150 daily orders through e-commerce platforms
- Routinely mentored new team members on daily tactics, operations, and service strategies, to meet sales objectives
- Regularly processed point of sale transactions, including cash or credit purchases, refunds, and exchanges

## LEADERSHIP EXPERIENCE

### DeGroote Finance & Investment Council (DFIC)

*Vice President, Previously: Director of Competition, Internal Relations Associate*

**Hamilton, ON**

*September 2021 – Present*

- Facilitated and promoted the DeGroote Finance & Investment Council's annual intercollegiate stock pitch competition
- Conducted educational events for DFIC members on a variety of topics including modelling and valuation techniques
- Familiar with financial models including discounted cash flow and comparable company analyses for the purpose of creating value-focused investments

### Association of Canadian Intercollegiate Investment Clubs (ACIIC)

*Investment Analyst, McMaster Chapter*

**Hamilton, ON**

*September 2021 – Present*

- Selected to be a part of McMaster's chapter for 2021-2022, to gain exposure to valuable learning opportunities
- Regularly utilized useful market data and analytics for the purposes of financial modelling, analysis, and valuation
- Routinely brought forth strong collaborative skills to work alongside analysts from several other Canadian universities

### World Association of Kickboxing Organizations (WAKO)

*Referee and Ringside Official, Previously: Athlete, Canadian National Kickboxing Team*

**Burlington, ON**

*September 2017 – Present*

- Significant experience as a referee and judge, to assist in the facilitation of fair competition and effectively scored bouts
- Extensive competitive experience as a former athlete and member of the Canadian National Kickboxing Team (WAKO)
- Most notable achievements include WKF World Junior Champion, WAKO Pan-American Silver and Bronze Medalist, WAKO North American Champion, and 2x WAKO National Champion, among many others

## ADDITIONAL INFORMATION

- **Software:** Experienced with Bloomberg, Refinitiv, S&P Capital IQ, Excel, PowerPoint, Outlook, and Power BI
- **Interests:** Coaching (Boxing and Kickboxing), Golf, Reading, Podcasts, Traveling, Foreign Cultures, and Languages
- **Certifications:** Bloomberg Market Concepts, Valuation (Erasmus University Rotterdam), and Financial Markets (Yale)
- **Languages:** Fluent in English (Native), actively working towards full professional proficiency in French (Intermediate)



# Gabrielle Durst

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## EDUCATION

### McMaster University – DeGroote School of Business

*Honours Bachelor of Commerce*

**Hamilton, ON**

*Expected Graduation 2024*

- **Academics:** Cumulative GPA of 3.8/4.0,
- **Awards:** Deans' Honour List (2020 – 2022)
- **Relevant Coursework:** Corporate Finance, Managerial Finance, Financial Accounting, Managerial Accounting, Microeconomics, Macroeconomics, Data Analytics, Calculus for Business

## PROFESSIONAL EXPERIENCE

### PricewaterhouseCoopers (PwC)

*External Audit Analyst*

**Toronto, ON**

*April 2022 – August 2022*

- Currently completing a 16-week internship at PwC within the External Audit division

### Kotright Public School

*Educational Assistant*

**Guelph, ON**

*October 2020 – December 2020*

- Worked 10 hours weekly as an educational assistant for a kindergarten class during a full course load and extracurriculars
- Prepared and organized 15+ educational class activities for students, introducing topics such as reading, spelling, and math
- Exhibited strong conflict management and leadership when quickly resolving student behavioral and interpersonal matters
- Selected to work individually with a high-need student, successfully teaching material in sync with class progression
- Demonstrated excellent professionalism and communication skills by effectively communicating progress to the children's parents

## LEADERSHIP EXPERIENCE

### DeGroote Finance & Investment Council (DFIC)

*Vice President of Events*

**Hamilton, ON**

*May 2022 – Present*

- DeGroote Finance & Investment Council (DFIC) prepares 80+ undergraduate commerce and engineering students for rewarding careers in capital markets.
- Lead the marketing and corporate relations team to successfully facilitate the planning and execution of large events with professional firms including the likes of Scotiabank, RBC, BMO, National, and CIBC.
- Hosted and facilitated large recruitment events, as well as industry speaker series for DFIC members to facilitate learning and networking opportunities within the industry.
- Scheduled and lead event/sponsorship pitch calls with 15+ HR directors and industry contacts from Fortune 500 companies, fintech startups, and venture capital firms.

*Corporate Relations Associate*

*January 2022 – Present*

- Organized and hosted 10+ industry speaker and campus recruitment events with professionals from firms like KPMG, RioCan, and RSM
- Led relationship management efforts by sending thousands of dollars' worth of gifts and personalized thank you notes to all sponsors, speakers, and recruiters
- Provided 150+ students the opportunity to network with campus recruiters, resulting in 10 Summer 2022 internship offers made to impressive event attendees

### JDCC DeGroote

*Accounting Delegate*

**Hamilton, ON**

*June 2019 – Present*

- Competed against 700+ students in a three-day case competition called JDC Central, contributing to a 3<sup>rd</sup> place finish for DeGroote
- Analyzed weekly accounting and finance-based cases and prepared a well-organized and professional presentation
- Met weekly with professor mentor to receive and implement feedback to improve critical thinking and presentation abilities
- Demonstrated strong numerical capabilities and idea generation by establishing practical and creative solutions to dozens of unique cases

## ADDITIONAL INFORMATION

- **Software:** MS Office, MS Outlook, G-Suite, HubSpot
- **Languages:** English
- **Activities:** DeGroote Impact (Supporting Non-Profits), DeGroote Commerce Faculty Representative, Illuminate Charity Gala (Raised \$100,000 for Charity), DeGroote Women in Business (Director of Finance)



# DEGROOTE FINANCE & INVESTMENT COUNCIL

Portfolio Managers



# Reece Colclough

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## EDUCATION

### McMaster University

*Honours Mathematics and Statistics, Statistics Sub-Plan, Minor in Finance*

**Hamilton, ON**

*Expected Graduation Spring 2024*

- **Academics:** Cumulative GPA of 3.7/4.0
- **Relevant Coursework:** Intro to Programming in Python (A), Computational Thinking in Haskell (A+), Programming in C & Unix based systems (A+), Advanced Calculus 2 (A-), Applied Linear Algebra (A+), Financial Mathematics (A), Probability (A)

### McMaster University – DeGroote School of Business

*Honours Bachelor of Commerce*

**Hamilton, ON**

*September 2019 – April 2021*

- **Academics:** Cumulative GPA of 3.7/4.0
- **Awards:** Deans' Honour List (2020 - 2021), Entrance Scholarship of \$2000
- **Relevant Coursework:** Managerial Accounting (A-), Corporate Finance (A-), Managerial Finance (A-), Applied Statistics (A), Operations Management (A-), and Information Systems (A+)

## PROFESSIONAL EXPERIENCE

### CIBC Capital Markets

*Global Markets Summer Analyst, eFX Sales & Trading*

**Toronto, ON**

*May 2022 – August 2022*

- Built a VBA tool which automatically aggregates, computes PNL, and exports forward/spot positions by value date and currency pair to a new excel sheet for booking, saving traders man hours
- Wrote a SQL script which gathered data of interest about liquidation for a given currency pair and date, accelerating the process of tracking and understanding the liquidity process
- Generated weekly reports in Tableau on G7, EM currency pairs to observe where key metrics are moving in aggregate or per client
- Utilized scikit-learn decision tree regressor to find variables which predict good PNL results

### McDonald's

*Swing Manager, Previously: Crew Trainer & Crew Member*

**Burlington, ON**

*April 2018 – May 2022*

- Awarded for performance via recognitions such as employee of the month (2019,2020) and market wide swing manager (2021)

## LEADERSHIP EXPERIENCE

### DeGroote Finance and Investment Council

*Portfolio Manager, Quant Group*

**Hamilton, ON**

*April 2022 – Present*

- Incoming Portfolio Manager to lead a team of 7 analysts on developing quantitative strategies using Python

*Quantitative Analyst, Derivatives*

*November 2021 – April 2022*

- Developed quantitative trading algorithms on the platform quant connect, used Python to execute market trades and the platform's database to backtest
- Independently researched various quant finance topics, specifically derivative topics
- Gave weekly market updates in specific areas on rotation, e.g., commodities, equities, fixed income etc.

## PERSONAL PROJECTS

*Linear Algebra Visualization Tool*

*February 2022 – April 2022*

- Built a Desmos.com like WebApp in Elm to help people learning linear algebra for the first time visualize vectors / transformations
- Allows the user to plot multiples vectors, add vectors, view properties such as length, angle between two vectors, etc.

*Binomial Option Pricing Model*

*November 2021 – February 2022*

- Built a recursive binomial pricing model in Python using the theory learned in the DeGroote Finance and Investment Council, specifically risk neutral valuation of options
- Effectively used knowledge of data structures and algorithms to reduce runtime and memory use

## ADDITIONAL INFORMATION

- **Programming:** Python, SQL, VBA, Tableau, Q (kdb+), C, R, Excel, Git, Bash, Unix, Shell Scripting, Haskell, Elm, Vim, VSCode
- **Additional Awards:** DeGroote School of Business Award (\$2000), Market Wide Swing Manager of the Month (\$150), Employee of the month March 2019 (\$50), Employee of the month August 2020 (\$50)
- **Certifications:** SQL Essential Training, Bloomberg Market Concepts
- **Interests:** Fitness, Nutrition, Snowboarding, Hockey (Toronto Maple Leaf's), Horror Movies

# Kevin McCreary

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## EDUCATION

### McMaster University – DeGroote School of Business

Hamilton, ON

*Honours Bachelor of Commerce with Internship*

*Expected Graduation 2023*

- **Academics:** Cumulative GPA of 3.7/4
- **Awards:** Deans' Honour List (2018 - 2021), Golden Key (top 15% of class)
- **Relevant Coursework:** Corporate Finance, Managerial Finance, Financial Accounting, Managerial Accounting, Data Mining

## PROFESSIONAL EXPERIENCE

### CIBC

Toronto, ON

*Co-op Student, Business Banking Sales Management Team*

*September 2021 – Present*

- Lead a work project which secured office space and ensured the proper technology for over 500 frontline Business Banking employees
- Summarized weekly National Business Banking financial results in a PowerPoint to present to Business Banking leadership
- Consolidated and purified Business Banking portfolios to ensure that over 400 frontline advisors had the correct clients
- Received an "Exceptional Student Award" which is awarded to those who have a positive attitude, team spirit, and have demonstrated CIBC's values of Trust, Teamwork, and Accountability.

### VWK Capital Management

Toronto, ON

*Summer Analyst*

*May 2021 – August 2021*

- Lead research on WW International which included a background check on management, comparing its peers and building a DCF to make a decision to short the company
- Presented analysis in morning meetings on a daily basis to the entire firm which was used to make investment decisions
- Analyzed numerous public documents on various companies in order to help make investment decisions

### Kinross Gold Corporation

Toronto, ON

*Gold Rush Summer Intern, Investor Relations*

*May 2020 – August 2020*

- Prepared and maintained an Investor Summary "Crib Sheet" utilized by Kinross' CEO, CFO, and Investor Relations executives in meetings and conference calls with shareholders and institutional investor
- Benchmarked Kinross against Senior Producer Industry Peers from detailed reviews of 15 different Wall Street, Bay Street, and Howe Street Equity Research publications, and research reports
- Calibrated Kinross relative to its Industry Peers across various financial and physical metrics

### Upper Canada College Summer Camps

Hamilton, ON

*Camp Counsellor*

*June 2016 – August 2019*

- Managed 12 direct reports and interacted with clients on a daily basis to ensure a successful business unit
- Taught 60 students a week in an all-sports camp, helped campers improve their skills and made sure they were satisfied with the service provided, resulting in many students returning in later weeks

## LEADERSHIP EXPERIENCE

### DeGroote Finance and Investment Club

Hamilton, ON

*Portfolio Manager, Resources*

*September 2021 – Present*

- Lead a team of 6 analysts in preparing a stock pitch on Nomad Royalty to get the company approved by the Club's board and have it added to the Fidelity Canada Balanced Investment Fund

### CIBC

Toronto, ON

*Student Leadership Academy*

*January 2022 – Present*

- Held monthly socials for incoming students and hosted panel discussions with Senior CIBC employees

## ADDITIONAL INFORMATION

### Quarterback at Lawrence Park Collegiate (2014-2018)

- Voted as a team captain by teammates (2016, 2018)
- Received award for "Being the Field General" (2018, awarded to the player who exhibits strong leadership skills)
- Received Career Award (2018, awarded to the player with the strongest commitment to the team over their four years of high school)

# Erik Yelle

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## EDUCATION

### McMaster University – DeGroote School of Business

**Hamilton, ON**

*Honours Bachelor of Commerce*

*Expected Graduation 2023*

- **Academics:** Cumulative GPA of 3.7/4.0
- **Awards:** Deans' Honour List, McMaster University Entrance Scholarship, first place in the RBC Business Case Challenge 2021
- **Area of Focus:** Finance with a minor in computer science

## PROFESSIONAL EXPERIENCE

### BDO

**Toronto, ON**

*Intern, Valuations*

*April 2021 – August 2021*

- Completed a 16-week summer internship at BDO within the Valuations Group executing modeling, research and analyzation skills
- Conducted research and prepared Purchase Price Allocation's, Commercial Real Estate Valuations and Asset Based Valuations and arranged their respective reports for small to medium private operating and holding companies
- Redesigned and developed a new Real Estate Valuation excel template for the group leveraging the Capital IQ plug in
- Actively managed and acquired market research via IBIS World, CoStar, Real Net and Bloomberg transforming the data into digestible information for senior managers and analysts
- Coordinated with upper management in various departments to deliver highly quality internal reports in a timely manner

### St. Georges Golf Course

**Toronto, ON**

*Member Liaison*

*June 2019 – August 2020*

- Provided exceptional service and maintenance at one of Canada's premier golf courses
- Effectively anticipated and delivered upon member requests. Ensured extraordinary and personal customer service
- Refined interpersonal skills whilst interacting with members to ensure a pleasant experience

### YMCA Summer Camp

**Toronto, ON**

*Camp Counsellor*

*June 2018 – September 2018*

- Developed strong leadership skills while utilizing numerous strategies and group play to inspire motivate and educate campers
- Worked alongside other camp counsellors to deliver a structured agenda of daily activities in a diverse work environment

## EXTRA CURRICULAR AND VOLUNTERER ACTIVITIES

### DeGroote Finance and Investment Council

**Hamilton, ON**

*Senior Analyst, Diversified*

*August 2021 - Present*

*Analyst, Real Estate*

*October 2020 – August 2021*

- Assisted DFIC in the management and active investment of \$100,000 whilst preparing stocks pitches for industry professionals
- Conducted discounted cash flow, comparable, and precedent transaction valuations on North American Firms
- Acquired thorough knowledge of creating models using Excel and Excel VBA workflows to accomplish tasks
- Prepared and delivered detailed PowerPoint stock pitch decks and recommendations to a panel of peers
- Provided financial training and information sessions to new members of the investment council

### McMaster Greensuits

**Hamilton, ON**

*Student Leader*

*June 2021 – Present*

- Successfully lead and provided continuous communication during orientation week activities welcoming freshman students to university and assisting them in assimilating and succeeding in the DeGroote and McMaster environment communication
- Created a plethora of mentee relationships with first year students to mentor and support them in pursuing their goals efficiently

### Etobicoke Collegiate Institute

**Toronto, ON**

*Math Tutor*

*Sept 2018 – June 2019*

- Effectively taught fundamental math concepts to high school and middle school students; 2-3 regularly scheduled weekly sessions

## ADDITIONAL INFORMATION

- Proficient in Microsoft Office applications, Refinitiv API, and intermediate in object-oriented programming applications (Python)
- Provincial and GTHL AAA champion in 2018 and was drafted in the Ontario Hockey League by the Windsor Spitfires in 2017
- General member of the McMaster Sports Business Association and frequent volunteer at Toronto Rehab fundraising events

# Jason A. Townsend

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## EDUCATION

### McMaster University – DeGroote School of Business

Hamilton, ON

*Honours Bachelor of Commerce*

*Expected Graduation 2023*

- **Academics:** Cumulative GPA of 3.8/4.0
- **Awards:** McMaster Honour Award (90%+ entrance average), Dean's Honour List (2020-2021)
- **Relevant Coursework:** Corporate Finance, Accounting, Valuation, M&A, Restructuring, Macroeconomics

## PROFESSIONAL EXPERIENCE

### McMaster University – DeGroote School of Business

Hamilton, ON

*Research Assistant*

*September 2021 – Present*

- Developed a financial literacy curriculum to co-author a personal finance course that will be distributed not-for-profit to disadvantaged youth in Hamilton

### Aecon Group

Toronto, ON

*Summer Finance Student*

*Summer 2021*

- Researched the Canadian industrials sector to narrow down acquisition candidates based on financial performance and other relevant criteria relating to company strategic goals
- Reviewed confidential information memoranda and conducted due diligence to prepare ad hoc analyses and valuation models for 4 prospective acquisitions
- Conducted research on institutional and ultra-high-net-worth investors to assist in developing the company's investor relations strategy for 2022
- Led the early-stage capital budgeting of a multi-million-dollar ESG initiative and presented a summary of the analysis to C-suite management

### Canaccord Genuity Wealth Management

Toronto, ON

*Administrative Assistant*

*Summer 2020*

- Communicated regularly with ~100 clients and responded promptly to their needs to foster client-advisor relationships
- Produced portfolio updates for clients across various investment strategies (growth, wealth preservation, etc.)
- Helped prepare investment presentations and other marketing materials used by an advisor for client acquisition

## LEADERSHIP EXPERIENCE

### DeGroote Finance & Investment Council

Hamilton, ON

*Director of Finance*

*April 2021 – Present*

- Supervised the club's bank account, and its ~\$100,000 portfolio of North American equities on behalf of Fidelity Investments
- Forecasted cash flows and performed sensitivity analysis to calculate a budget for the 2021-2022 academic year
- Created and presented a comprehensive valuation guide to 40+ club members, explaining how to develop discounted cash flow, comparable companies, precedent transactions, and leveraged buyout models

*Portfolio Manager (Power, Utilities, & Industrials)*

*April 2021 – Present*

- Led a team of 6 analysts in researching PUI companies and preparing equity research reports to generate investment theses and target prices for current and prospective holdings

*Newsletter Editor-in-Chief*

*December 2020 – Present*

- Researched and analyzed financial news stories to write the club's weekly market update newsletter
- Built models in Excel to add 3 pages to the weekly market update newsletter, which pull data from Bloomberg into tables and graphs summarizing movements in global equity, fixed income, foreign exchange, and commodity markets

### Investa Insights

Hamilton, ON

*Portfolio Manager (US Portfolio)*

*March 2021 – Present*

- Led a team of 6 analysts in preparing market research, transaction analyses, and stock pitches on US companies
- Selected holdings for the US portfolio of Canada's fastest-growing intercollegiate investment club

## ADDITIONAL INFORMATION

- **Software:** Microsoft Suite (Excel, PowerPoint, Word), VBA, Python, Bloomberg, Capital IQ, Refinitiv
- **Interests:** Toronto Maple Leafs, Toronto Raptors, Fishing, Chess, History (especially early 19<sup>th</sup> century to late 20<sup>th</sup> century)

# Hendrik Teeuwsen

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## EDUCATION

### McMaster University – DeGroote School of Business

Hamilton, ON

*Honours Bachelor of Commerce*

*Expected Graduation 2023*

- **Academics:** Cumulative GPA: 3.74/4.0; Finance GPA: 3.95/4.0
- **Awards:** CNID 2021 Investment Challenge Winner (1<sup>st</sup> out of 20), McGill 2021 ESG Stock Pitch Competition Semi-Finalist (top 10% out of 200), Deans' Honour List (2020, 2021), McMaster Honour Award (2019)

## PROFESSIONAL EXPERIENCE

### Canadian National Railway Pension Fund (CN Investment Division)

Montreal, QC

*Intern Analyst: Infrastructure & Private Debt*

*May 2021 – December 2021*

- Currently completing an 8-month internship at CN Rail's internally managed pension fund, reporting directly to the portfolio manager.
- Produced comparable analysis, discounted cash flows analysis, and investment memos to evaluate 9 prospective fund investments and co-investments worth \$300M, presenting my findings to the portfolio manager and senior management.
- Developed and implemented a new quarterly reporting system resulting in more efficient and concise reporting.
- Created an ESG evaluation system in Excel to rank external managers which account for a total of \$3.2B in assets under management.
- Received offer to extend initial summer internship an additional four months.

### McMaster University – DeGroote School of Business

Hamilton, ON

*Teaching Assistant: Commerce 1AA3, Financial Accounting*

*September 2020 – December 2020*

- Held office hours focused on educating students on financial concepts such as the accounting cycle and financial statement analysis which improved their performance and ability to answer questions on exams.
- Supported in the preparation and delivery of 50+ lectures and test proctoring for 500+ students, ensuring a seamless transition to online learning and an excellent student experience.

## LEADERSHIP EXPERIENCE

### BG Capital Management

Vancouver, BC

*Research Analyst: Canadian Telecom & Infrastructure*

*January 2021 – Present*

- Constructed a portfolio allocation model in Python using Markowitz Mean-Variance Portfolio Theory to distribute \$1 million of capital in a low volatility portfolio with a target cash yield of ~5% and a total return of 8 to 10%.
- Built a dividend discount model to value Enbridge (TSX: ENB) at \$53 per share, implying an 18% upside from the current price.

### DeGroote Finance & Investment Council

Hamilton, ON

*Portfolio Manager: Power, Utilities, & Industrials*

*September 2020 – Present*

- Pitched Kinaxis (TSE: KXS), applying an ESG focused comparable valuation. Led to a buy recommendation with a thesis focusing on the firm's large TAM, consistent deployment of new products, and strong ESG score.
- Displayed strong leadership abilities by coaching fellow analysts on thesis generation, valuation techniques, and PowerPoint formatting, leading to a promotion to portfolio manager after my first year as an analyst.

### Investa Insights

Hamilton, ON

*Co-Head: McMaster Chapter*

*September 2020 – Present*

- Analyzed Renewable Energy Group (NYSE: REGI), building a discounted cash flows model to support my thesis that the market is undervaluing the company's operational expansion plans and margin enhancement initiatives.
- Built a discounted cash flows model analyzing Gilead's acquisition of Immunomedics, concluding that it was a speculative acquisition since the target's main drug, "Trodely" has not been approved for most intended uses.

### Urban Growing Systems Inc.

Hamilton, ON

*Analyst: Business Development*

*August 2020 – December 2020*

- Led the development of pitch decks used for investor presentations, which included company and product overview slides that detail UGSI's product offering, SaaS platform, management team, and 12-month roadmap.
- Actively participated in meetings with management to generate effective marketing strategies to secure funding from investors, resulting in a \$5 million investment.

## ADDITIONAL INFORMATION

- **Software:** Microsoft Suite, Refinitiv, Bloomberg Terminal, Mergent, IBISWorld
- **Interests:** Weightlifting, Mountain Biking, Nonfiction Reading (Peter Thiel, Jocko Willink, Alexandr Solzhenitsyn, Nassim Taleb)



# DEGROOTE FINANCE & INVESTMENT COUNCIL

Senior Analysts



# Ardena Bašić

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## EDUCATION

### McMaster University – DeGroote School of Business

**Hamilton, ON**

*Honours Bachelor of Commerce; Integrated Business & Humanities (IBH)*

*Expected Graduation 2024*

- **Academics:** Cumulative GPA of 3.9/4.0; *Specializing in finance and entrepreneurship*
- **Awards:** Deans' Honour List (2020 - 2022), Ashbaugh Scholarship (\$5000), 1<sup>st</sup> Place in DFIC Private Equity Competition
- **Relevant Coursework:** Introduction to Finance, Financial Accounting, Managerial Accounting, Statistics for Business

## PROFESSIONAL EXPERIENCE

### Scotiabank Wealth Management

**Toronto, ON**

*Scotiabank Intern*

*May – August 2022*

- Demonstrating excellent legal research skills, including areas of the law that are still developing legislatively, and in doing so actively participating in dialogue and assisting with interpretation
- Reviewing, and updating accordingly, over 1800 trust accounts to ensure compliance with constantly changing international regulations pertaining to wealth management - displaying technical and organizational expertise
- Planned and led a session for the Scotia Women's Initiative, providing in-depth training and strategies for advisors to support clients

### INVRs

**Toronto, ON**

*Part-time Investment Research Analyst*

*May – August 2022*

- Conducting in-depth research pertaining to specific equities, industries and the overall market and synthesizing them into reports presented to the platform's audience of over 50,000 DIY investors
- Building financial models – such as DCFs and LBOs – alongside visuals to support investment theses and analysis on a myriad of equities and industries

### ABrain Break

**Hamilton, ON**

*Founder & Manager*

*August 2021 – Present*

- ABrain Break is a pandemic-accelerated venture offering a variety of mental health resources cope with overwhelming feelings
- Created coping kits, the Brain Dump Journal, Brain Dump cards and led seminars currently used by the Thames Valley District School Board (TVDSB) and Wellkin's locations (Southwestern Ontario Child & Youth Mental Wellness Non-Profit)

### LeapGrad

**Hamilton, ON**

*Digital Marketing Intern*

*September 2021 – December 2021*

- Actively researched new marketing trends, managed content creation on social media and monitored engagement analytics
- Authored 100+ threads, comments and messages regarding recruitment, university applications and undergraduate degrees

### Basic Cars Inc.

**Woodstock, ON**

*Secretary*

*September 2016 – Present*

- Assisted in drafting and editing a wide variety of financial and administrative documents for accounting and organizational purposes
- Organized and updated inventory databases while tracking dozens of metrics such as price, miles and damage reports

## LEADERSHIP EXPERIENCE

### DeGroote Finance and Investment Council (DFIC)

**Hamilton, ON**

*Senior Analyst - Power, Utilities and Infrastructure (PUI)*

*January 2022 - Present*

- Assisted in the construction and editing of investment theses, financial modelling (DCF's, comparables, etc.) and other relevant information using tools like Excel, PowerPoint and Bloomberg/Refinitiv
- Conducted over 100 hours of research on multiple companies using Mergent, Bloomberg/Refinitiv and publicly available reports

### Lawyer-Ed

**Hamilton, ON**

*Department Founder, Podcast Director & Writer*

*January 2021 – Present*

- Wrote monthly articles pertaining to legal topics for the organization's journal, alongside leading a team of 60 other pre-law students in recording podcasts to expand outreach, awareness of the organization and individual and collective professional networks
- Outlined and executed short and long-term objectives, creating and utilizing a database of over 200 articles and podcast topics

## ADDITIONAL INFORMATION

- **Software:** Bloomberg, Refinitiv, MS Office, G-Suite, Canva, Zoom, Slack, Discord
- **Additional Awards:** McMaster President's Award (95% admission average); Woodstock Civic Student Award of Excellence
- **Languages:** French & Bosnian/Croatian (Professional Proficiency), Spanish/Italian/Portuguese (Limited Proficiency)
- **Activities:** WCM Protégée (2021 – present), McMaster Barbell (Vice President and Finance Executive), McMaster pre-law society executive, Battle on Bay McMaster Delegate (2022); Silhouette Student Newspaper Contributor (2021 – present)
- **Interests:** Weightlifting/Powerlifting, Music (RCM Level 10 piano), Reading (*the Alchemist*, *A Brief History of Thought*)



# Oleg Glotov

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## EDUCATION

### McMaster University

*Honours Bachelor of Engineering (Software Engineering) & Minor in Finance*

**Hamilton, ON**

*Expected Graduation 2024*

- **Academics:** Cumulative GPA: 3.8/4.0
- **Coursework:** Finance I (A), Data Structures and Algorithms (A-), Software Development (A)

## PROFESSIONAL EXPERIENCE

### TMK Group

*Summer Intern*

**Moscow, RU**

*July 2019 – August 2019*

- Summer Intern at TMK Software and Testing Team for Summer 2019
- Remodeled existing oil and natural gas pipeline threaded connections using the Abaqus FEA to allow more efficient stress testing simulations.
- Improved existing Python simulation scripts to allow better interactivity for the engineering and design team during all phases of testing.

### SB Development

*Summer Intern*

**Moscow, RU**

*May 2019 – June 2019*

- Summer Intern at SB Development Engineering Team for Summer 2019
- Developed critical project metrics used by the electrical engineering team. Was introduced to common project pipeline management strategies. Analyzed and then effectively strategized in regard to current goals, deadlines and schedules.
- Gathered project requirements to facilitate an accurate project documentation.
- Reviewed and refactored draft reports used by the engineering team.

## ACADEMIC EXPERIENCE

### Hackathon (DeltaHacks)

*Team Leader*

**Hamilton, ON**

*January 2020*

- Assembled a team of 4 developers to create a working web application prototype based on the Django high-level Python web framework.

### DeGroote Finance & Investment Council (DFIC)

*Quant Group Analyst*

**Hamilton, ON**

*October 2021 – Present*

- Collaborated with a team of 6 analysts to create algorithmically driven investment strategies using Python and the QuantConnect platform.
- Developed and tested profitable trading algorithms with a focus on the swing trading investment strategy utilizing various APIs and numerous Python libraries.
- Worked with the quant team to provide feedback on proposed strategies based on personal research and progress.

## PERSONAL PROJECTS

### Algorithmic Trading Software

Python, Yahoo API, Quantconnect platform

- An algorithmic trading program, developed with strategies based various technical analysis indicators.
- Automated to preform daily analysis and look for potential opportunities in the market.

### Web Scraper

Python, Selenium, Bash/Unix scripts, Automator

- A web tool to regularly check an online store for recent restocks and notify client.
- Developed with Selenium tools in Python.
- Automated with bash scripting and the use of cron jobs.

### Telegram Message Bot

Telegram API, SQL, Amazon Web Services

- An interactive bot created as a learning project to explore AWS and Telegram API.
- Developed using Python.
- Deployed on a virtual Ubuntu machine for 24/7 access.
- Employed SQL to store and access user message history.

## ADDITIONAL INFORMATION

- **Programming:** Python · Java · SQL · R · MATLAB · C/C++ · Excel/VBA · HTML/CSS · JavaScript
- **Other Software:** MS Office (PowerPoint and Excel), GitHub, Adobe Creative Cloud Suite
- **Awards:** Deans' Honour List (2019 – Present)
- **Interests:** Snowboarding, Cooking, Geopolitics, Machine Learning, and Graphic Design.

# Jash Mehta

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## EDUCATION

### McMaster University – DeGroote School of Business

Hamilton, ON

*Honours Bachelor of Commerce with Internship*

*Expected Graduation December 2023*

- **Academics:** Cumulative GPA of 3.3/4.0; Finance GPA: 3.7/4.0
- **Awards:** Deans' Honour List (2020 - 2021), McMaster Honour Award (2018), Capitalize on Covid Bursary (\$1,000)
- **Relevant Coursework:** Securities Analysis, Managerial Finance, Managerial Accounting, Financial Modelling

### CFA Institute

- Passed CFA Level 1 Exam: November 2021

## PROFESSIONAL EXPERIENCE

### CN Investment Division

Montreal, QC

*Incoming Infrastructure and Private Debt Analyst*

*June 2022 – October 2022*

- Selected to intern at CNID after competing in the annual Investment Challenge with a pitch on Costco Wholesale Corporation

### Mercedes-Benz Financial Services

Mississauga, ON

*Risk Management Intern*

*September 2021 – May 2022*

- Prepared monthly reports for internal and external stakeholders assessing performance and health of \$5 billion lease portfolio
- Provided graphical breakdowns of month over month changes in operating metrics to supplement reports and add clarity
- Introduced an interactive presentation format for portfolio performance review meetings which added context for operating results and increased engagement

### Willis Towers Watson

Toronto, ON

*Compensation Analyst Intern*

*May 2021 – August 2021*

- Conducted preliminary review of compensation surveys of over 100 companies to support the compensation consulting team
- Analyzed and ran validations on extensive data sets with 30+ data elements and 10,000+ records through Access and Excel
- Supervised team of 3 interns in the report creation process, while maintaining strict adherence to reporting protocol
- Conducted due diligence on client company financials and compensation structure to ensure accuracy and consistency
- Regularly corresponded with clients to request and update submission data, as well as address questions and concerns

### 407 ETR

Woodbridge, ON

*Finance Intern*

*May 2019 – August 2019*

- Conducted trend analysis across customer demographics and presented revenue, usage, and collection trends on 10,000+ trips to the Finance and AR departments
- Accelerated project completion timeline by developing and distributing scripts and macros to team members to automate data entry, eliminating human errors, and increasing efficiency by 125%
- Completed reconciliation of collection and billing accounts and investigated discrepancies for the accounting team

## LEADERSHIP EXPERIENCE

### DeGroote Finance & Investment Council

Hamilton, ON

*Portfolio Manager – Metals & Mining*

*September 2021 – Present*

- Analyst in student run investment club responsible for pitching compelling companies in the metals & mining sector for inclusion in the club's \$100,000 investment fund
- Collaborated with team to develop NAV models, and conduct comparable company analysis to effectively value companies
- Analyzed equity research, corporate, and technical reports to support investment theses while identifying catalysts and risks
- Pitched Nomad Royalty (NSR.TO) to advisory board for inclusion in the DFIC investment fund
- Received return offer as Portfolio Manager for the Metals & Mining team

### WallStreetOasis

Toronto, ON

*Finance Writer*

*October 2021 – December 2021*

- Authored detailed definitions for the WSO financial dictionary to maximize SEO rankings and cater to wide audiences
- Collaborated with SEO specialist to implement new features on webpages to enhance user experience for 900,000 members

## ADDITIONAL INFORMATION

- **Software:** Microsoft Office, G-Suite, IBM Cognos, Microsoft Access, Slack, SAP, Bloomberg Terminal
- **Additional Awards:** Marquee Group Stock Pitch Competition (1<sup>st</sup>), CNID Investment Challenge (Finalist), FinComp 2022 (2<sup>nd</sup>)
- **Additional Certificates:** Bloomberg Market Concepts (BMC), AmplifyMe Finance Accelerator
- **Interests:** Cycling, Swimming, Weightlifting, Consumer Electronics and Technology

# Cameron Byberg

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## EDUCATION

### McMaster University – DeGroote School of Business

**Hamilton, ON**

*Honours Bachelor of Commerce*

*Expected Graduation 2025*

- **Academics:** Cumulative GPA of 3.99/4.0
- **Awards:** DeGroote School of Business Deans Achievement Award (\$1500), DeGroote Deans Entrance Award (\$500)
- **Relevant Coursework:** Financial Accounting, Business Data Analytics, Business Calculus, Introduction to Macroeconomics
- **Athletics:** Pitcher on McMaster Men's Varsity Baseball Team

## PROFESSIONAL EXPERIENCE

### Equitable Bank

**Toronto, ON**

*Incoming Delivery and Productivity Intern*

*May 2022 – August*

### Royal Bank of Canada (RBC)

**Toronto, ON**

*Client Advisor*

*November 2020 – August 2021*

- Provided advice to clients with a direct focus on investment, loan, and banking product education
- Excelled in both quantitative and qualitative results from sales reports and client surveys
- Received client satisfaction survey scores of 100% each month; regionally recognized by management for retailing excellence
- Over \$300,000 in secured client investment purchases, surpassing assigned targets
- Exceeded role expectations by providing \$860,000 in referred business to mortgage and investment specialists

### McDonalds

**Whitby, ON**

*Team Leader*

*June 2017 – September 2020*

- Worked 20+ hours a week part-time while balancing a full semester course load and elite-level baseball
- Promoted to leadership position at just 16 at restaurant with top-five sales volume in Ontario
- Diligently trained new staff while giving and receiving feedback to enhance workplace efficiency
- Assisted management in directing day-to-day operations and revenue
- Successfully managed crew with consistent focus on optimization of quality and output

## LEADERSHIP EXPERIENCE

### DeGroote Finance & Investment Council (DFIC)

**Hamilton, ON**

*Investment Analyst - PUI*

*September 2021 – Present*

- Carefully selected as 1 of 12 students from a pool of 100+ applicants to join DFIC's Power, Utilities, and Infrastructure (PUI) investment team
- Proactively collaborated with team of 6 other students to manage a \$100,000 portfolio of Canadian and U.S. public equities
- Prepared timely investment memorandums, stock pitches, and presented unique analyses at DFIC bi-weekly meetings to an industry Board of Directors
- Quickly learned and leveraged software such as Bloomberg, Refinitiv, Excel, and PowerPoint to produce clean and accurate financial models
- Built a variety of comparable companies and discounted cash-flow (DCF) models to provide audience with precise relative and intrinsic valuation

### Sinclair Secondary School Mock Trials

**Whitby, ON**

*Lead Counsel*

*September 2019 – February 2020*

- Led a team of 12 students in board-wide mock trials concerning both criminal and Charter arguments
- Developed and presented opening and closing statements and examinations of witnesses at the Whitby Superior Court of Justice
- Silver medalist in Durham District School Board Criminal Mock Trial Competition as prosecution

## ADDITIONAL INFORMATION

- **Software:** Bloomberg, Refinitiv, MS Office, MS Outlook, G-Suite
- **Academics:** Valedictorian of Glen Dhu Public School, Achievement Certificate for Highest Average in Grade 12 Economics
- **Standardized Testing:** ACT (American College Test) Score of 30, Representing the 95<sup>th</sup> percentile
- **Interests:** Professional Baseball, Law & Politics, Personal Fitness, Chess, Fashion

# Timothy Wang

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## EDUCATION

### McMaster University – DeGroote School of Business

Hamilton, ON

*Honours Bachelor of Commerce with Internship*

*Expected Graduation 2024*

- **Academics:** Cumulative GPA of 3.7/4.0, Minor in Environmental Sciences
- **Awards:** Deans' Honour List (2019 - 2021)
- **Relevant Coursework:** Int. Financial Accounting, Int. Microeconomics, Managerial Finance, Managerial Accounting

### McMaster University – Faculty of Science

Hamilton, ON

*Concurrent Certificate, Geographic Information Science (GIS)*

*Expected Graduation 2023*

- **Academics:** Cumulative GPA of 3.8/4.0
- **Tasks:** Completion of 18+ units of geospatial data science using ESRI ArcGIS products, spatial statistics, and programming
- **Relevant Coursework:** Advanced Vector GIS, Advanced Raster GIS, Remote Sensing, GIS Programming (Python)

## PROFESSIONAL EXPERIENCE

### Deloitte LLP

Toronto, ON

*Staff Accountant I*

*April 2022 – August 2022*

- Incoming Summer 2022 Staff Accountant at Deloitte Canada's Toronto audit group

### eSight Corporation

Toronto, ON

*Accounting Intern*

*May 2021 – Present*

- Engaged in process flow documentation in the transition of ERP from Epicor to Microsoft Dynamics 365, guiding future employees on how to record sales and purchase invoices as well as recognizing cash receipts
- Executed various ABCOTD tasks related to the 2020 year-end audit, such as providing requested samples for raw-materials and R&D expenses to help facilitate the cost analysis performed by external auditors
- Reinforced relationships with key business partners such as US Department of Veterans Affairs by regularly communicating sales information and remitting quarterly sales commissions for using the Federal Supply Schedule Program
- Created new sales tracking reports on Salesforce to improve the cross-functional collaboration of teams, the reports sped up reconciliations by 3- 5 hours at month-end for the sales and finance teams by consolidating data from several reports into one, these reports are further used by the board as monthly reporting material
- Optimized the weekly bank transaction analysis by implementing Excel drop-down lists to avoid P&L classification errors which prevented misclassification of up to \$5000 in transaction data to give management more accurate information for cash controls

### DeGroote Finance & Investment Council

Hamilton, ON

*Senior Investment Analyst – Metals & Mining / Resources*

*September 2020 – Present*

- Collaborated with the portfolio manager to build NAV models of promising junior miners and presented the team's selection to DFIC's VP Finance before pitching to a board of industry professionals
- Pitched and executed positions in Talon Metals (October 2020) and Fission Uranium (April 2021); Talon Metals achieved a 120% ROI over the span of only 6 months

## LEADERSHIP EXPERIENCE

### University of Guelph

Guelph, ON

*Youth Track & Field Camp Counsellor*

*July 2016 – Present*

- Led 30 – 50 campers aged 6 – 14 each week through fitness testing; provided individualized training for the sprints and long jump events to optimize the young athlete's personal bests
- Co-created the "Mini-Olympics" event in 2017 for camp finale, at which the young athletes fostered one another's confidence and skills through friendly competition in a safe and encouraging environment

### Speed River Track & Field Club – University of Guelph

Guelph, ON

*Captain*

*July 2015 – June 2019*

- Led a nationally ranked youth track & field club of 40+ athletes by organizing practices and coaching the long jump, three athletes in the team qualified for the 2019 Legion Canadian National U18 Championships
- Delegated coaching related tasks to other senior athletes and established protocols to ensure team success

## INTERESTS

- **Financial news:** Avid reader of The Economist and Wall Street Journal
- **Track & Field:** Former Canadian national-level athlete in the long jump, ranked 2<sup>nd</sup> during the 2018 season with a jump of 6.64m
- **Travel & filmmaking:** Created and uploaded videos to YouTube documenting trips through 35+ countries across 3 continents

# Ethan Currie

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## EDUCATION

### McMaster University – DeGroote School of Business

Hamilton, ON

*Honours Bachelor of Commerce*

*Expected Graduation 2024*

- **Academics:** Cumulative GPA of 3.7/4.0 (A-), Minor in Economics
- **Awards:** Deans' Honour List, McMaster Entry Scholarship (\$1,000)
- **Relevant Coursework:** Corporate & Managerial Finance, Financial & Managerial Accounting, Analytical Decision-Making, Micro/Macroeconomics, Applied Marketing Management, Information Systems in Business

## PROFESSIONAL EXPERIENCE

### National Bank of Canada Financial Markets

Toronto, ON

*Sales & Trading Analyst – Fixed Income, Currencies, Commodities*

*May 2022 – August 2022*

- Current position, 4-month internship ending 08/26/2022.

### Bank of Nova Scotia (Scotiabank)

Toronto, ON

*Mortgage Officer Intern – Real Estate Secured Lending (RESL)*

*May 2021 - August 2021*

- Provided rate exceptions through various distribution channels, on over \$1,000,000,000 in mortgages and secured lines of credit, based on client relationships, financial risk, status, and potential
- Assisted with appraisal and investigation teams to provide excellent turn-around-times and a great customer experience
- Prepared meeting presentations, conducted pricing spread reports, and published internal resources for lending services
- Participated in a two-week onboarding program, consisting of multiple networking events, guest speakers, courses, and training on bank policy, credit risk, security and more

### Melmart Distributors Inc.

Mississauga, ON

*Warehouse Assistant*

*July 2020 - August 2020*

- Accountable for packing, shipping, and tracking hardwood flooring to hundreds of customers across Canada and the United States
- Utilized Microsoft Excel to communicate shipment order details, requiring a high degree of accuracy and speed

### Longo's Brothers Fruit Markets Inc.

Milton, ON

*Customer Service Representative*

*August 2017 - March 2020*

- General customer service/cashier duties, stocking/organizing inventory, and assisting in other departments as required
- Balanced part-time work with a full school schedule and competitive hockey, which demanded my time ~6 days per week

### Camp Kahquah

Magnetawan, ON

*Program Director, Counsellor and Crew Member*

*Summer 2017 - 2019*

- Organized camper activities, working alongside partners or small groups to ensure a pleasant family camping experience
- Led a variety of camping activities such as canoeing and rock climbing, while supervising campers in a cabin group
- Performed a variety of kitchen, maintenance, cleaning, and programming duties as both a paid staff member, and volunteer

## LEADERSHIP & VOLUNTEER EXPERIENCE

### LIFT Church

Hamilton, ON

*Outreach Volunteer*

*March 2021 - Present*

- Work as a part of a small volunteer team which helps distribute warm meals, grocery bags, and clothing to those in need
- Demonstrate a welcoming, safe community to bring joy to families and individuals who are experiencing financial hardship

### Blyth Academy

Burlington, ON

*Volunteer Hockey Coach*

*September 2018 - March 2020*

- Assisted two professional goalie coaches develop young talent involved with Burlington Minor Hockey
- Demonstrated on-ice drills, provided insights into how players can improve their performance

## ADDITIONAL INFORMATION

- **Software:** Microsoft Office, G-Suite, Refinitiv Workspace, Bloomberg Terminal
- **Activities:** McMaster – DeGroote Finance & Investment Council (Analyst, Senior Analyst) Financial Marauder (Staff Writer), Commerce Program Ambassador, First-Year Orientation Program (Mentor)
- **Interests:** Health & Wellness, Sports (Hockey, Golf), Kayaking, Investing & Personal Finance



# Matthew Randall

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## EDUCATION

### McMaster University – DeGroote School of Business

Hamilton, ON

*Honours Bachelor of Commerce, Level II – Finance/Accounting Major, Minors in Economics and Comp-Sci*

*Expected Graduation - 2025*

- **Academics:** Cumulative GPA of 3.8/4.0
- **Relevant Coursework:** Financial Accounting, Marketing, Macro & Microeconomics, Calculus, Data Analytics

## PROFESSIONAL EXPERIENCE

### National Bank of Canada – Financial Markets

Toronto, ON

*Sales and Trading Analyst – Institutional Equities Team*

*May 2022 – August 2022*

- Generated and delivered content to institutional US clients, creating efficient market summaries and analyses to engage over 4,800 US clients, contributing to an increase in client accounts of +20% YTD
- Actively managed CRM and intelligence software to organize tailored market information based on investor style and fund strategy
- Developed automation and modeling solutions in excel to increase efficiency and create market models for client information
- Constructed databases and models to illustrate information on client interactions, location, and transaction value with the bank, providing management team with important insight on client accounts

### Brant County Ford

Brantford, ON

*Accounting Associate*

*October 2021 – April 2022*

- Managed Accounts Payable, ensuring all invoices are directed to the correct accounts and paid on time
- Coordinated all Repair, Work, and Part Orders, ensuring each is recorded correctly and expensed to corresponding accounts
- Assisted in the reconciliation of bank and book statements, ensuring no discrepancy between bank and bookkeeping records
- Provided management with commentary, updates and analysis on accounts, for use in financial reporting

### Brant County Ford/Strickland's GM

Brantford, ON

*Sales and Leasing Consultant*

*November 2020 – October 2021*

- Consulted with and qualified 50+ customers monthly, creating 20+ opportunities for business
- Lead successful negotiations, holding 97%+ gross profit in every deal, resulting in maximum profits
- Generated \$20,000+ monthly in gross profit through dealership operations
- Ensured customers understanding of sales contracts, achieving high customer satisfaction ratings

## LEADERSHIP EXPERIENCE

### DeGroote Finance & Investment Council

Hamilton, ON

*Senior Analyst, Diversified Industries Group*

*September 2021 – Present*

- Analyzed and proposed specific investment strategies and opportunities for DFICs balanced portfolio of Canadian and US equities
- Constructed investment theses on equities, supported by valuation models such as DCF and Precedent Transactions method
- Presented investment theses and portfolio recommendations to board of directors

### McMaster World Congress

Hamilton, ON

*Head and Managing Director*

*March 2022 – Present*

- Organized, created, and facilitated McMasters largest student conference of over 2500+ students from university and select high schools
- Oversaw and contributed to marketing, treasury, and external relations teams, to produce a professional and well attended event
- Participated in and developed relationships with external sponsors to secure funding and speakers for future events

### Mac AI Ventures

Hamilton, ON

*Associate Consultant*

*January 2022 – Present*

- Conducted pro bono venture capital services, market research and industry analysis for AI startups
- Contributed to valuation, consulting projects, market risk analysis, and research to create strategy recommendations
- Presented projects and research to company and team executives, communicating recommendations to leadership for implementation

## ADDITIONAL INFORMATION

- **Technical Skills:** Financial Modeling, Valuation, Microsoft Office, G-Suite, Bloomberg Terminal, Excel, Python, VBA,
- **Additional Certifications:** Financial Modeling (Marquee Group), Commercial Banking (JP Morgan), Bloomberg Market Concepts
- **Activities:** Competitive Football, McMaster Intramural Participant, Community Volunteer Work (2CBeyond, Caledonia Foodbank)
- **Interests:** Financial Markets, Automotive Engineering, Business Reviews, Metals and Mining, Alpine Skiing, Athletics

# Richard Chen

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## EDUCATION

### McMaster University – DeGroote School of Business

*Honours Bachelor of Commerce, Level 2*

**Hamilton, ON**

*Expected Graduation 2024*

- **Academics:** Cumulative GPA of 4.0/4.0, Specialization in Finance, Minor in Economics
- **Awards:** Deans' Honour List (2020 – Present), The Wong Family Academic Grant (\$1,000), McMaster Honour Award (\$750)
- **Relevant Coursework:** Corporate Finance, Securities Analysis, Financial Accounting, Managerial Accounting, Applied Statistics, Intermediate Microeconomics, Intermediate Macroeconomics

## PROFESSIONAL EXPERIENCE

### Coldwater Corporate Finance Inc.

*Mergers & Acquisitions Analyst*

**Toronto, ON**

*May 2022 – Present*

- Valued private Canadian companies from a sell-side mandate through comparable company and precedent transaction analysis
- Facilitated the due diligence process of a \$14M sell-side deal involving a custom software development firm, corresponding with one of the largest private equity funds to strategically source required information and successfully close the deal
- Developed CIMs for potential acquisition targets, producing financial forecasts and conducting extensive research on industry dynamics and the competitive landscape, resulting in the successful generation of buyer interest for client companies

### Coco Fresh Tea & Juice

*Barista*

**Toronto, ON**

*August 2020 – August 2021*

- Maintained high standards of customer service during high-volume, fast-paced operations, resulting in 5-star Google reviews
- Communicated clearly and constructively with coworkers and management, contributing to a positive, growth-oriented work culture
- Built loyal clientele through friendly interactions and consistent appreciation, gaining over 10 return customers, and increasing sales

### Markville Chevrolet

*Accounting Co-op Student*

**Markham, ON**

*September 2018 – January 2019*

- Performed reconciliations between business financial statements, verifying cash flow, catching errors, and preventing fraud
- Oversaw office organization and handled sensitive documents, resulting in accurate recordkeeping and smooth document retrieval
- Posted vehicle information, including vehicle model, price, and other relevant data into an enterprise resource planning system

## LEADERSHIP EXPERIENCE

### DeGroote Finance and Investment Council

*Senior Analyst, Diversified Industries Group*

**Hamilton, ON**

*January 2022 – Present*

- Analyzed and recommended investment opportunities for DFIC's \$100K balanced portfolio of Canadian and U.S. equities
- Pitched Intuitive Surgical (NASDAQ: ISRG) to the DFIC Board, highlighting their unique moated position in a growing market
- Assisted the Portfolio Manager to lead a team of 4 analysts to construct investment theses on Canadian and U.S. equities supported by valuation models including precedent transactions, comparable companies, and DCF, developing strong capabilities in S&P Capital IQ and Bloomberg

*Analyst, Diversified Industries Group*

*September 2021 – December 2021*

- Proactively collaborated in a team of 7 ambitious students to build comprehensive stock pitch presentations on equities including Deckers Brands (NYSE: DECK) and Generac Holdings Inc. (NYSE: GNRC), supporting a buy recommendation for both

### Chen Tutoring

*Mathematics Tutor*

**Hamilton, ON**

*September 2021 – April 2022*

- Conducted individualized tutoring sessions with a grade 8 student and determined areas which require additional assistance
- Designed and implemented activities and exercises to develop mathematical, analytical, problem solving, and critical thinking skills, improving assessment scores by over 15%

### Power Unit Youth Organization

*Finance Director, The E3 Challenge*

**Markham, ON**

*September 2019 – Present*

- Established and presented the proposed \$2,500 budget with detailed explanations, resulting in all E3 departments having sufficient funds to perform their respective activities
- Managed over \$2,500 in cash flows and reimbursements for the E3 organizing committee and challenge participants, enabling all members to receive their appropriate funds back in less than 2 weeks

## ADDITIONAL INFORMATION

- **Software:** Microsoft Office (Excel, PowerPoint, Word, SharePoint), Bloomberg, S&P Capital IQ, QuickBooks, Python, Photoshop
- **Languages:** Bilingual English & Cantonese, Limited Working Mandarin, Elementary French
- **Interests:** Camping – Canoeing & Hiking (Manitoba & Alberta), Trading Sneakers (Air Jordan, Yeezy), Volleyball (Recreation)



# Benjamin Ashford

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## EDUCATION

### Honours B. Com Integrated Business and Humanities – Finance Specialization (Expected)

Sept 2020 – May 2024

McMaster University – DeGroote School of Business

Hamilton, ON

- **Academics:** Cumulative 3.4/4.0 GPA
- **Relevant Coursework:** Corporate Finance, Financial Accounting, Managerial Accounting, Statistical Data Analysis, Macroeconomics, Critical Thinking

## PROFESSIONAL EXPERIENCE

### Deal Sourcing Analyst

May 2022 – June 2022

Harbour Grove LLC. (Search Fund)

Hamilton, ON

- Scheduled to complete a 4-week internship with a Harbour Grove LLC - search fund, assisting in sourcing acquisition opportunities

### Business Integration Analyst, Corporate Real Estate

May 2022 – Present

BMO Financial Group

Toronto, ON

- Developing comprehensive division-wide SharePoint document repository and MS Teams sites for 10K+ document items using scheduling and time management, effective communication, problem solving and technical expertise to optimize workflow, document management, and collaboration for 5 functional teams to increase overall operational efficiency
- Leading the integration efforts of the real estate division of a recently acquired business to streamline workflows between 5 functional teams and acquired business contributing to management of 1.8M new customers to increasing Bank's U.S. presence
- Developed a standardized KPI Scorecard for 150+ suppliers using Excel, attention to detail, problem solving, and collaboration skills to accurately assess supplier performance resulting in improved operational efficiency and supplier relationship management

### Trading Floor Coordinator

Jan 2022 – May 2022

Allen H. Gould Trading Floor – DeGroote School of Business

Hamilton, ON

- Assist and educate students on key functions in Thomson Reuters Eikon and Bloomberg Terminal to analyze global securities

### Real Estate Administrator & Bookkeeper

May 2021 – May 2022

4Group Inc.

Brampton, ON

- Communicate with 22 tenants to coordinate cheque and documentation receipt and resolve issues resulting in 100% tenancy
- Developed a property management application in Excel with automated notifications to submit a request for cheques, tenant payment history, and real time reporting of tenant cheque counts for \$15M of commercial real estate, increasing operational efficiency
- Reconcile accounts for the generation of Profit and Loss, Balance Sheet, and HST Summary statement with high attention to detail
- Developed a tool in Excel to tabulate all debits & credits before entry in QuickBooks, improving efficiency and reporting accuracy

## LEADERSHIP EXPERIENCE

### Financial Analyst – Private Markets

Sept 2021 – May 2022

DeGroote Finance & Investment Council – Private Markets Division

Hamilton, ON

- Executed the development of a report on reverse takeovers for FirePower, a mid-market Private Capital and M&A advisory firm based in Toronto with \$2.8Bn+ in live deal aggregate value, to inform their m&a advisory division of new capital raising methods
- Conducted due diligence for FirePower Capital's Private Capital arm using research of key metrics and analysis of business models, quality of management, financial backing, and use cases presented in PowerPoint to highlight financial sponsorship opportunities
- Presented analysis of an acquisition to VP, Senior, and Junior Analysts, selected for the team's further analysis and transaction report
- Pitched a SaaS company to FirePower Capital's Private Capital arm in a presentation to highlight financial sponsorship opportunities

### Private Equity Case Competition Winner

Nov 2021 – Dec 2021

DeGroote Finance & Investment Council – Private Equity Intercollegiate Case Competition

Hamilton, ON

- Placed 1<sup>st</sup> through collaborating with a team to create and deliver a PowerPoint presentation of rationale for taking a company private
- Created leveraged buyout and discounted cash flow financial models with sensitization to analyze and justify investment rationale
- Conducted research of company financials, industry, and business model using Bloomberg Terminal and reports to inform decisions

### Delegate - Case Competition Club

Sept 2020 – May 2021

EliteSeat McMaster – General Mills & Canada Post Case Competitions

Hamilton, ON

- Planned financial allocation for budgets from \$250K - \$500K for marketing campaigns to retain and attract new consumer segments

## SKILLS AND INTERESTS

- **Software:** Microsoft Office, Google Suite, Bloomberg Terminal, Thomson Reuters Eikon, Environics Analytics, R
- **Awards & Certifications:** Bloomberg Market Concepts, The Marquee Group (Capital Markets Overview), MVP of Private Markets
- **Interests & Activities:** Weight Training and Fitness, Hockey, News (Wall Street Journal, Morning Brew), Battle on Bay Stock Pitch Competition, South Africa Water Scarcity Case Competition (1<sup>st</sup> place), WealthSimple Event Representative (Secured club funding)



# DEGROOTE FINANCE & INVESTMENT COUNCIL

Analysts

# Alekzander Simic

(416) 735-0336 | simica@mcmaster.ca | www.linkedin.com/in/alekzandersimic

## EDUCATION

### McMaster University – DeGroote School of Business

*Honours Bachelor of Commerce*

**Hamilton, ON**

*Expected Graduation 2025*

- **Academics:** Cumulative GPA of 3.72/4.0
- **Awards:** The George and Nora Elwin Scholarship (\$5,000), The DeGroote School of Business Deans Entrance Award (\$1,000), DeGroote School of Business Achievement Award (\$1,000)
- **Relevant Coursework:** Financial Accounting, Engineering Calculus, Data Analytics, Microeconomics, Macroeconomics, Organizational Behavior, Business Environment, Personal Leadership

## PROFESSIONAL EXPERIENCE

### Sound Solutions

*Estimator*

**Brampton, ON**

*Summer 2018, 2019*

- Interpreted architectural drawings for large scale projects and provided accurate estimates on square footage of concrete skin needed
- Used organizational and time management skills to manage multiple large projects and devised a work plan that prioritized efficiency
- Effectively worked under pressure and efficiently managed my time with collaboration between coworkers
- Adeptly used programs such as Excel to price and estimate total cost of material, labour, and freight to customers

### Mini Indi Go-Kart Course

*Employee*

**Etobicoke, ON**

*Summer 2021*

- Worked collaboratively alongside coworkers and assisted management in conducting daily services
- Helped maintain over 60 go-karts daily and actively communicated with customers providing them with consistent service
- Assisted in managing money transactions between the company and customers and provided accurate daily revenue results
- Actively maintained the go-kart course and ensured unfailing safety on all sections of the course

## LEADERSHIP EXPERIENCE

### DeGroote Finance & Investment Council (DFIC)

*Equities Analyst*

**Hamilton, ON**

*January 2022 – Present*

- Carefully selected as 1 of 3 students from a pool of 50+ applicants to join DFIC's Diversified Industries Group (DIG) investment team
- Proactively collaborated with a team of 6 other students to manage a \$100,000 portfolio of Canadian and U.S. public equities
- Prepared and presented timely investment memorandums, stock pitches, and unique analyses at bi-weekly meetings to a Board of Directors made up of senior industry professionals
- Quickly learned and leveraged software such as Bloomberg, Refinitiv, Excel, and PowerPoint to produce clean and accurate financial models and pitch decks
- Thoroughly researched and developed in depth industry analyses and company overviews
- Built a variety of comparable companies and discounted cash-flow (DCF) models to provide audience with precise relative and intrinsic valuation

### Wesburn Manor Old Age Home

*Volunteer*

**Etobicoke, ON**

*September 2019 – February 2020*

- Led a café environment taking orders and serving up to 100 seniors on weekend mornings
- Worked as part of an extensive volunteer team enhancing the residents' lives and gaining a new perspective on aging
- Provided training to new volunteer staff through hands-on and visual learning in a busy environment
- Supplied the residents with a helping hand and served as somebody that they can actively converse with

## ADDITIONAL INFORMATION

- **Athletics:** Competitive Soccer Player (12 Years), High School Varsity Soccer Team
- **Academics:** 93% High School Cumulative Average, High School Mathematics of Data Management (99%), Advanced Functions (96%), Calculus and Vectors (92%),
- **Interests:** Podcasts (We Study Billionaires, Real Vision Daily Briefing), Sports (NBA, FIFA, NFL), Music (Rock, Pop, Rap), History (Economics, War), Personal Fitness, Cryptocurrencies
- **Awards:** Completed the Royal Conservatory of Music Exams with Honors for Guitar

# Joseph E. Clinton

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## EDUCATION

### McMaster University – DeGroote School of Business

Hamilton, ON

*Honours Bachelor of Commerce in Integrated Business & Humanities, Level II*

*Expected Graduation June 2024*

- **Academics:** Cumulative GPA of 3.75/4.0, *Anticipated Minor in Economics*
- **Awards:** Deans' Honour List (2020 - 2021), DBS Entrance Award and Honour Award
- **Relevant Coursework:** Finance, Accounting, Economics, Statistics, Bloomberg Market Concepts, ATZIN Internet Antenna Fundraising, Water Without Borders University of Cape Town Joint Project

## PROFESSIONAL EXPERIENCE

### Pricewaterhouse Coopers (PwC)

Toronto, ON

*Summer Associate, Assurance, Risk Assurance*

*May 2022 – Present (August 2022)*

- Completing a 16-week internship in the financial services assurance practice, and risk assurance ESG & reporting group

### TMX Group Limited

Toronto, ON

*Sustainable Finance & Investor Relations Student Analyst*

*September 2021 – December 2021*

- Researcher and forecaster; reported to the Director of Sustainable Finance, the Vice President of Investor Relations, and Senior Management; of ESG & Reporting, and Investor Relations
- Built various models and simulations, and analyzed findings on TMX's various exchanges, for possible use in future securities and indexes, tracking ESG ETFs, Low Carbon Commodities, Green bonds, the Mining sector, and Net-zero minerals
- Took part in various TMX intuitional investor calls, representing TMX Investor Relations worldwide
- Developed and completed various research in IR and Sustainability strategy and policies, product and corporate governance competitor analyses, in addition to current and future disclosure and regulatory requirements in OECD markets around the world
- Completed various document, model, simulation, portal, and presentation revisions, for both internal and external use at the group

### McMaster University

Hamilton, ON

*Trading Floor Coordinator – Allen H. Gould Trading Floor*

*January 2022 – Present*

- Supervised and aided students through the market research process utilizing McMaster's financial resources and licenses
- Assisted students with navigating and accessing the Bloomberg and Thomson Reuters terminals and the respective excel API

*Teaching Assistant – SUSTAIN 1SO3, IBH 1BD3, COMMERCE 1AA3*

*September 2021 – Present*

- **Courses:** Introduction to Sustainability (Sustain 1SO3): Incoming June 2022, Introduction to Peace Studies for IBH (IBH 1BD3): December 2021 – April 2022, Introductory Financial Accounting (Commerce 1AA3): September 2021 – December 2021
- Provided support to 50 - 200+ students virtually and in-person throughout the academic terms
- Aided in the re-design of IBH 1BD3, with a focus on global development and the United Nations SDGs
- Proctored examinations for 800+ students, and supported faculty through evaluation and marking upholding academic integrity
- Ran and designed IBH 1BD3 tutorials with a focus on the application of real-world impact projects and career development

### CDW Canada

Toronto & Ottawa, ON

*Security Intern - CDW Canada – Professional Services*

*June 2021 – August 2021*

- Worked with departments across Canada and the US developing strategy and processes for a new possible division and expansion into the Canadian market for the Canadian arm of the Fortune 500 Company
- Completed research and tested projects for future implementation within the organization, and client offerings
- Beta tested products, training material, and software for future use within the Government and Corporate Operations divisions
- Developed and presented presentations, with one being a financial literacy presentation to at-risk adolescents in the Chicago area

## LEADERSHIP & INVOLVEMENT EXPERIENCE

### DeGroote Finance and Investment Council (DFIC)

Hamilton, ON

*Senior Analyst, Diversified Group*

*September 2021 – Present*

- Graduated into a senior analyst position; assisted portfolio manager in leading a team of analysts recommending, and pitching specific strong equities for the \$100,000 long term balanced investment fund
- Refining valuation, and pitch building capabilities, in addition to technical skills in Excel, PowerPoint, CapitalIQ, and Bloomberg

## ADDITIONAL INFORMATION

- **Software:** Bloomberg, Refinitiv, Microsoft Office, CapitalIQ, Python, R, MATLAB, C++, VBA, Excel (Macros, Lookups, Pivots)
- **Awards & Activities:** RBC Future Launch Scholar, Charity of Hope Award Recipient, Marquee: Building a Financial Model, Bridge to Capital Markets, CSC Candidate, Battle on Bay & Van Berkomp Small-Cap McMaster Delegate, 1<sup>st</sup> DeGroote PE Competition
- **Interests:** Outdoors, Travel, Classic Rock, Personal Engineering Projects, Global Affairs, Research, History, Journalism

# Tanay Goyal

(613)-882-6981 | goyalt2@mcmaster.ca | www.linkedin.com/in/tanay-goyal

## EDUCATION

### McMaster University - DeGroote School of Business

*Honours Bachelor of Commerce – Level 1*

**Hamilton, ON**

*Expected Graduation 2025*

- **Academics:** Cumulative 10.29/12.0 GPA
- **Relevant Coursework:** Financial Accounting, Micro-Economics, Entrepreneurship, Marketing, Organizational Behaviour

## PROFESSIONAL EXPERIENCE

### Valsoft Corporation

*Incoming M&A Intern*

**Montreal, QC**

*May 2022 – August 2022*

- Scheduled to complete a 16-week summer internship at Valsoft on the M&A team

### WealthSimple

*Brand Advocate*

**Hamilton, ON**

*January 2022 – Present*

- Helped student's sign-up for WealthSimple's new cash application with referral codes
- Spread the word about events happening on campus through in-person and through social media
- Increased application downloads with excellent communication and interpersonal skills

### Chartwell Empress Kanata Retirement Residence

*Dining Room Server*

**Ottawa, ON**

*June 2021 – August 2021*

- Effectively interacted with residents, family members and visitors in a courteous and professional manner
- Multi-tasked to serve 6 tables, seating at least 30 residents through efficient time management, memorizing orders, and serving orders to residents
- Responded to resident or family member concerns and ensured appropriate action is taken

### McDonald's

*Cashier*

**Ottawa, ON**

*August 2019 – October 2020*

- Provided friendly and timely food and drinks service, handled all cash and credit card transactions, and multitasked efficiently to please customers
- Utilized exceptional communication and interpersonal skills to interact effectively with customers
- Performed workplace cleaning and maintenance tasks

### City of Ottawa - Financial Services

*Financial Services Co-op Student*

**Ottawa, ON**

*July 2019 – August 2019*

- Utilized SAP tax code knowledge to double check visa/p-card statements
- Inputted visa/p-card, and other financial statements into SAP
- Recognized for exemplary Microsoft Excel skills and asked to assist on two projects for different managers
- Scanned and copied accounts payable and receivable documents and directed them to their respective teams to be audited

## LEADERSHIP EXPERIENCE

### DeGroote Finance and Investment Council - (DFIC)

*Analyst – Private Markets*

**Hamilton, ON**

*September 2021 – Present*

- Executed the development of a report on SPACs for FirePower, a mid-market Private Capital and M&A advisory firm based in Toronto, to inform their M&A advisory division of new capital raising methods
- Pitched a SaaS company to FirePower Capital's Private Capital arm to highlight financial sponsorship opportunities
- Created a transaction analysis presentation on Amazon's acquisition of Metro-Goldwyn-Mayer Studios Inc. to be presented to FirePower Capital's Private Capital arm

## ADDITIONAL INFORMATION

- **Languages:** English (native), French (Basic), Hindi (Basic), Urdu (Basic)
- **Volunteering:** City of Ottawa - Camp Counselor, March Kanata Skating Club - Program Assistant, Cadets
- **Awards:** City of Ottawa - Volunteer of the Month, Cadets - 4 & 5 year Service Medal and Excellence Fitness Level, DFIC - Private Equity Case Competition (LBO) Finalist, DeGroote 24-Hour Case Competition Winner
- **Interests:** Travelling (Chichen Itza in Mexico, Hawaii); Avid Soccer and Hockey player

# Aaron Giri

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## EDUCATION

### McMaster University – DeGroote School of Business

*Honours Bachelor of Commerce (Finance)*

**Hamilton, ON**

*Expected Graduation April 2024*

- **Academics:** Cumulative GPA: 3.7/4.0, Dean's Honour List
- **Coursework:** Introduction to Finance (A+), Managerial Accounting (A), Introduction to Microeconomics (A)

### National University of Singapore – NUS Business School

*International Bachelor of Business Administration; McMaster Exchange Program*

**Queenstown, SG**

*January 2023 – April 2023*

## PROFESSIONAL EXPERIENCE

### Bank of Montreal

*Profit and Loss Analyst, Capital Markets P&L Product Control Team*

**Toronto, ON**

*May 2022 – August 2022*

- Reported daily Profit and Loss of Rates Structured Product Canada and U.S desks, as well as the Credit Structured products desk
- Efficiently analyzed various product types and hundreds of securities on excel to explain daily drivers to P&L
- Frequently had conversation with front office Traders to understand rationale behind various adjustments to P&L
- Gained strong exposure and analyzed Swaps, Options, Futures, European Swaptions, Callable Bonds, etc, while reporting daily and month to date P&L

### Harvey's

*Cashier and Garnisher*

**Stouffville, ON**

*August 2019 – March 2020*

- Worked in a fast-paced environment, serving upwards of 40 customers within an hour on weekends
- Regularly catered to customer needs effectively without the guidance or supervision of management or other employees
- Balanced part-time work with a full-semester course load and volunteering at a retirement home during lunch breaks

## EXTRACURRICULAR ACTIVITIES

### DeGroote Finance & Investment Council (DFIC)

*Analyst, Resources*

**Hamilton, ON**

*April 2022 – Present*

- Created comprehensive stock pitch presentations supported through compelling investment theses
- Pulled data from software's such as Bloomberg to conduct market research and assist in creating company and industry overviews of given equity
- Constructed various valuation methods such as a Discounted Cash Flow Model, and Comparable Companies Analysis

### The Association of Canadian Intercollegiate Investment Clubs (ACIIC)

*Investment Analyst*

**Hamilton, ON**

*September 2021- March 2022*

- Conducted analysis utilizing software such as Bloomberg and Refinitiv for stock pitch presentations
- Adhered to strict deadlines and worked on written research pieces and stock pitches simultaneously
- Developed strong attention to detail habits through gathering data while researching equities

### DeGroote Consulting Association (DCA)

*Director of Finance*

**Hamilton, ON**

*March 2022- Present*

- Oversaw day to day financial activities, budgeting, reimbursements, and invoicing
- Responsible for the hiring process of various analysts and team leaders for the DCA through testing applicants on their problem-solving skills
- Lead the team and helped host various speaker events with industry professionals/McMaster Alumni

## ADDITIONAL INFORMATION

- **Software:** Bloomberg, Refinitiv, Excel, PowerPoint, Outlook, Tableau, BMO Global Control Platform
- **Activities:** National Bank of Canada Stock Pitch Competition, The Marquee Group: Capital Markets Overview, Investment Banking and Brokerage report, KPMG Ideation Challenge, ACIIC Take Private Competition
- **Interests:** Boxing, chess, adrenaline activities, travelling to historic sites (Palace of Versailles, Tower of London)



# Jake Ireland

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## EDUCATION

### McMaster University — DeGroote School of Business

*Honours Bachelor of Commerce Level II*

**Hamilton, ON**

*Expected Graduation 2024*

- **Academics:** Cumulative GPA of 3.7/4.0
- **Awards:** Deans' Honour List (2020-2021), McMaster Honour Award Entrance Scholarship, DeGroote School of Business Entrance Award
- **Relevant Coursework:** Finance, Economics, Financial Accounting, Operations, Statistics, Information Systems, Human Resources

### A.Y. Jackson Secondary School

*Ontario Secondary School Diploma*

**Ottawa, ON**

*September 2017 - June 2020*

- Graduated as an Ontario Scholar and in Honour Society.
- **Awards:** OCDSB Silver Medal (2018-2020), Subject Awards in: International Business, World History, Career Studies and Leadership.
- Student Leader in J-Crew Leadership Program and Course.

## PROFESSIONAL EXPERIENCE

### Geotab

*Sales Systems Intern*

**Oakville, ON**

*May 2022- Present*

- Currently working as a Sales Systems Intern at Geotab in the Sales Operations Department.
- Leveraged programs like Salesforce to establish reports and dashboards to generate insights from sales data.
- Performed various data cleansing and data governance duties to increase efficiency and alignment of sales data and processes.

### Laura's Your Independent Grocer

*Customer Service Representative*

**Ottawa, ON**

*June 2018- August 2021*

- Was selected to train several of my coworkers in positions as Cashiers and Customer Service Clerks.
- Responsible for the cigarette counter, and the sale of cigarettes and tobacco products.
- Operated the OLG lottery machine and sold customers online and physical lottery tickets.
- Picked, packed, and coordinated the delivery of customers' online grocery orders through the PC Express program.

## EXTRACURRICULAR AND VOLUNTEER EXPERIENCE

### DeGroote Ambassador Program

*Student Ambassador*

**Hamilton, ON**

*October 2021 – Present*

- Currently a Student Ambassador within the DeGroote Ambassador Program.
- As an ambassador representing the Commerce program, I provide information to parents and prospective students regarding the program through the recruiting events and initiatives undertaken throughout the school year.

### DeGroote Finance and Investment Council

*Analyst, TMTH*

**Hamilton, ON**

*September 2021 – Present*

- Currently an Analyst on the Technology, Media, Telecommunications and Healthcare team.
- Gained skills using MS Office programs like Excel & PowerPoint as well as programs like Refinitiv Workspace.
- Learned how to construct and present a stock pitch on multiple companies in the TMTH space.

### DeGroote Accounting Association

*General Member*

**Hamilton, ON**

*September 2020 – Present*

- Attended several networking and social events to build networking skills and meet peers.
- Participated in industry nights like Road to CFO and CPA Night and heard from & networked with accounting professionals.

## ADDITIONAL INFORMATION

- **Software:** Microsoft Office, Google Workspace, Refinitiv Workspace, Salesforce
- **Courses:** Foreign Exchange Essentials (Corporate Finance Institute), Bloomberg Market Concepts (Bloomberg Education), Refinitiv Workspace Essentials (Corporate Finance Institute), Personal Finance Essentials (McGill University & Desautels Faculty of Management).
- **Interests:** Basketball, Podcasts, Hockey, Soccer, Music, Football.



# Bhavya Chakrala

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## EDUCATION

### McMaster University – DeGroote School of Business

Hamilton, ON

*Bachelor of Commerce, Level I*

*Expected Graduation 2025*

- **Academics:** Cumulative GPA of 3.78/4
- **Awards:** McMaster University Award of Excellence (top 10% of incoming class), DeGroote School of Business Award of Excellence with Scholarship (\$3000)
- **Relevant Coursework:** Introductory Financial Accounting, Business Data Analytics, Organizational Environment and Behavior

## PROFESSIONAL EXPERIENCE

### Guest Registration Assistant

Hamilton, ON

*McMaster Housing and Conferencing Services*

*October 2021 – April 2022*

- Managed fast-paced check-in processes for over 10-15 students at once, independently and efficiently
- Served on-campus residence students in a strong customer-facing role with passion and a positive attitude
- Regulated and enforced COVID-19 policies in residence buildings while checking in students
- Utilized range of problem – solving skills to handle and provide solutions for unique check-in issues with students

## LEADERSHIP EXPERIENCE

### DeGroote Finance and Investment Council (DFIC)

Hamilton, ON

*Analyst, Diversified*

*October 2021 – Present*

- Participated in extensive group work to create 2-3 stock pitches encompassing a range of research and technical skills
- Sought clarification and assistance from Portfolio Managers on new tasks to learn and extend my knowledge in Finance
- Proactively strengthened feedback environment from Industry Advisor by taking in-depth notes for learning purposes

### FOCUS Youth

Markham, ON

*Executive Secretary*

*January 2020 – December 2021*

- Managed and organized bi-weekly team meetings using a range of digital applications such as Slack and Google
- Collaborated with a team of 30+ individuals who share a passion to make a difference for youth in the GTA by creating informational workshops and running fundraisers
- Initiated and established policies for Secretary and HR Managers over 2-years of dedicated effort

### Pioneers of Tomorrow

Markham, ON

*Executive Researcher*

*October 2020 – June 2021*

- Developed research skills by researching crucial information to help over 4-6 run fundraisers and digital events
- 3-4 successful research pieces were published in the format of digital posts on sites such as Instagram and LinkedIn
- Strengthened informational research skills, and teamwork skills while managing a full-time course load

### SHSM (Specialist High Skills Major) Council

Markham, ON

*Business SHSM Executive Head*

*September 2020 - June 2021*

- Generated over 5-6 innovative events ideas while leading and collaborating with a team of 3-4 of like-minded team members
- Lead, supervised, and actively planned event schedules, and played a central part in events with attendance of over 50+ students
- Standardized certain administrative and event procedures while working closely with the Directors of the council

## ADDITIONAL INFORMATION

- **Software:** Microsoft Office, Microsoft Outlook, G-Suite, Slack, Canva, Adobe Photoshop and Illustrator
- **Languages:** English, Telugu, and Hindi (can understand)
- **Interests:** Reading (Harvard Business Review occasionally), Listening to Music, Singing, Art, Badminton
- **Activities:** Mentee Member at the First Year Orientation Program, General Member of DeGroote Accounting Association

# Aidan Marks

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## EDUCATION

### McMaster University – DeGroote School of Business

*Honours Bachelor of Commerce Level II*

**Hamilton, ON**

*Expected Graduation 2024*

- **Academics:** Cumulative GPA of 3.85/4.0
- **Awards:** Deans' Honour List (2020-2021), Deans Entrance Award and Honour Award (\$2000)
- **Area of Focus:** Finance, minor in Economics
- **Relevant Coursework:** Introduction to Finance, Managerial Finance, Financial Accounting, Managerial Accounting, Decision Making with Analytics, Intermediate Macroeconomics

## PROFESSIONAL EXPERIENCE

### Innovation, Science and Economic Development Canada

*Junior Project Officer, Office of the Superintendent of Bankruptcy*

**Hamilton, ON**

*May 2022 – August 2022*

- Scheduled to complete a 16-week summer internship at Innovation, Science and Economic Development Canada

### Food Basics

*Clerk, Produce Department*

**Caledonia, ON**

*April 2018 – Present*

- Exceeded management's expectations by demonstrating a strong work ethic and dependability while performing duties which led to additional responsibilities
- Trained full and part-time employees how to effectively perform tasks and follow established procedures, increasing employee comprehension and productivity
- Independently categorized and organized produce shipments in order of date of arrival, facilitating easier accessibility to product and reducing the quantity of wasted produce
- Supervised the night shift while store undergoes scheduled maintenance to ensure the safety of employees and timely completion of maintenance tasks

### Grand River Dinner Cruises

*Waiter and Cleaner*

**Caledonia, ON**

*May 2016 - October 2018*

- Cleaned and prepared the boat which included vacuuming, setting tables, and organizing seating arrangements to adhere to hospitality standards and efficiently seat all guests
- Greeted customers as they boarded, resolved problems as they arose, and promptly served them during the meal, improving customer experience and satisfaction
- Coordinated with team members to delegate tasks to ensure all mandatory tasks were completed within time frame of the cruise and to streamline operations

## EXTRACURRICULAR EXPERIENCE

### DeGroote Finance and Investing Council

*Analyst, Private Markets*

**Hamilton, ON**

*September 2021 - Present*

- Contributed to the analysis of a merger and acquisition transaction by providing a comprehensive industry overview with in-depth research and presenting the data via PowerPoint
- Identified, researched, and analyzed a private company using specific criteria to be pitched to the club's sponsor, in order to provide them with a well-rounded investment opportunity
- Collaborated with a small team to research the steps involved in establishing a capital pool company, the requirements and regulations, and the costs associated with the process for the sponsor to implement into its business

## ADDITIONAL INFORMATION

- **Software:** Proficient in Microsoft Office (Word, Excel, PowerPoint)
- **Certifications:** Marquee Group (Building a Financial Model), Bloomberg Market Concepts
- **Interests:** Formula 1, Fitness, Reading business and investing books, Soccer, Badminton, Investing
- **LinkedIn Learning:** Completed several courses including *Financial Modelling Foundations*, *Excel for Investment Professionals*, and *Excel for Corporate Finance Professionals*

# Tejaswi Sarao

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## EDUCATION

### McMaster University – DeGroote School of Business

*Honours Bachelor of Commerce*

**Hamilton, ON**

*Expected Graduation 2024*

- Integrated Business, Finance, and Humanities
- **Awards:** Entrance Scholarship (\$750), 2020
- **Relevant Coursework:** Corporate Finance, Intro to Finance, Financial Accounting, Marketing, Intro to Microeconomics, Intro to Macroeconomics, Managerial Accounting, Perspectives to Canadian Business, Data Analysis

## PROFESSIONAL EXPERIENCE

### Canadian Imperial Bank of Commerce (CIBC)

*Analyst – Capital Markets, Client Services*

**Toronto, ON**

*May 2022 – Present*

- Demonstrated intensive organization and management skills through taking on many project management roles to ensure tasks are proceeding according to plan and ensuring clear communication with stakeholders frequently resulting in higher team efficiency.
- Processed regular competitor scans by creating competitor decks and made recommendations on opportunities or areas of concern through the process of reporting, research, and analysis resulting in higher team awareness.
- Shadowed and worked closely with a variety of stakeholders to design and build products while monitoring the market and competitors resulting in a higher amount of evaluation being completed for new opportunities resulting in overall growth.

### Mississauga Stairs and Railings

*Business and Financial Analyst*

**Mississauga, ON**

*April 2021 – September 2021*

- Demonstrated excellent attention to detail assisting with bookkeeping, reconciliation, accounts payable and receivables, and office file management for over 60 clients ensuring accuracy in all systems
- Shadowed and helped analyze and compute expenses, labor cost and material cost resulting in overall savings in accounting and accurate financial data
- Adapted into new roles providing the company flexibility in back up support to the office during the busy work season, which saved expenses by 20%

### TD Canada Trust

*Customer Experience Associate*

**Thornhill, ON**

*March 2021 – May 2022*

- Processed financial transactions like deposits, withdrawals, drafts, and bill payments
- Assisted a team to complete daily routine tasks and office administration tasks while building a positive, diverse, and equitable work environment
- Provided comprehensive advice by possessing knowledge of TDCT products and keeping up-to-date with local market and competitive offers
- Generated new business by advising clients to take advantage of new offers, services, and open new accounts which helps to strengthen relationships and drive volumes while also ensuring clients are well informed and kept up-to-date with bank offerings

## LEADERSHIP EXPERIENCE

### DeGroote Finance and Investment Council

*Investment Analyst (PUI), Previously: Private Markets Analyst*

**Hamilton, ON**

*September 2021 – Present*

- Worked together with a team to create stock pitches, transaction analyses, and search initiatives
- Completed deliverables including RTO, CPC, and SPAC for companies such as Firepower Capital
- Construct various valuation methods including DCF, and Comparable Companies Analysis while also researching several M&A deals while creating company overview decks and transaction analyses by using research tools to extract relevant background material

### DeGroote Accounting Association

*First Year Associate*

**Hamilton, ON**

*September 2020 – May 2021*

- Acted as a primary liaison between the association and first-year students at DeGroote School of Business
- Promoted club events to recruit new members and grow the outreach of the association

## ADDITIONAL INFORMATION

- **Software:** MS Office, MS Outlook, G-Suite, Slack, PowerPoint, Excel, Adobe Analytics, Jira
- **Languages:** English, Hindi, Punjabi, Urdu
- **Activities:** Campaign organization, Long-term care volunteer, Youth outreach volunteer for newspaper company
- **Interests:** Travelling, Dancing, Cooking, Skiing, Community Involvement, Real-estate market

# Chloe Asselstine

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## EDUCATION

### McMaster University – DeGroote School of Business

Hamilton, ON

*Honours Bachelor of Commerce*

*Expected Graduation December 2023*

- **Academics:** Cumulative GPA of 3.9/4.0
- **Awards:** Deans' Honour List (2020-2022), McMaster Honor Award (2020), DeGroote School of Business Award (2020), Hawkrigg Family Scholarship (2021), Beale-Lincoln-Hall Travel Scholarship (2022)
- **Relevant Coursework:** Corporate Finance, Financial Modeling, Managerial Accounting

## PROFESSIONAL EXPERIENCE

### RBC Capital Markets

Calgary, AB

*Investment Banking Analyst (Summer 2022) – Energy Group*

*April 2022 – August 2022*

### Deloitte Canada

Toronto, ON

*Quality and Risk Analyst*

*April 2021 – August 2021*

- Coordinating over 500 information requests and data collections related to monitoring or marketplace business relationships with a high degree of effectiveness
- Assessing the completeness and accuracy of holdings, financial relationships and transactions entered into the Firm's electronic monitoring system
- Reviewing third-party anti-corruption questionnaires to determine appropriate risk migration procedures as appropriate
- Joined Indigenous Allies Committee and the Women in Finance Committee at Deloitte to get involved in leadership roles during my placement

### Deloitte Canada

Burlington, ON

*High School CO-OP Student in Mergers and Acquisitions Tax*

*February 2020 – June 2020*

- Retrieving and distributing client documents concerning taxes and audits to staff and clients required attention to detail to ensure confidentiality and reliability.
- Used TaxPrep systems and Excel to compile information in an organized manner for executives and created synopses for those who could not make it to client meetings, ensuring staff members were always informed of meetings and discussions.
- Worked with the IT department, consulting department, tax department and audit department to aid in completing tax season in the most well-ordered ways possible.

## LEADERSHIP EXPERIENCE

### Brain Cancer Canada Charity

Toronto, ON

*Board Member and Volunteer*

*October 2020 – Present*

- Created my first merchandiser business with help of the charity making totes bags to raise awareness for brain cancer
- Created fundraising campaigns which gained national coverage across Canada
- Have fundraised close to \$100,000 for the charity thus far
- Pitched a successful sales pitch to the National Hockey League for a corporate donation (\$30,000 donated on behalf of the NHL, not included in my total fundraised)

### Additional Current Leadership Experience

- Active Member of Women in Capital Markets
- General Member of DeGroote Women in Business
- DeGroote School of Business Ambassador and Recruiter
- Social Marauder Outreach Member
- Undergraduate Supplemental Application Assessor for DeGroote School of Business

## ADDITIONAL INFORMATION

- **Software:** Microsoft Office, Microsoft Outlook, G-Suite, ZoomInfo
- **Additional Awards:** Lieutenant General's Volunteer Award, B2 French certificate, Duke of Edinburgh National Award, SHAD Fellowship, RBC Capital Markets Women's Advisory Program
- **Interests:** Skiing in British Columbia, traveling, baking anything gingerbread flavored

# Justin Harmanescu

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## EDUCATION

### McMaster University – DeGroote School of Business

*Honours Bachelor of Commerce*

Hamilton, ON

*Expected Graduation 2023*

- **Academics:** Cumulative GPA of 3.9/4.0
- **Awards:** Deans' Honour List (2019 - 2021), Entrance Scholarship (\$2000), Golden Key (top 15% of class)
- **Relevant Coursework:** Options & Futures Trading (A+), Securities Analysis (A), Financial Modelling (A+), Portfolio Management (A+), Managerial Finance (A), Financial Accounting (A), Corporate Finance (A), Applied Statistics (A+),

## PROFESSIONAL EXPERIENCE

### BMSelect Ltd.

*Mortgage Underwriter*

Burlington, ON

*May 2022*

- Balanced the need for loan-volume growth with the equally important necessity of optimum underwriting quality to minimize risk while maximizing profitability.
- Leveraged knowledge of loan products to help restructure turned-down loans for subsequent approvals. Maintained compliance with lending, underwriting and government requirements.
- Maintained meticulous attention to detail in underwriting mortgages. Evaluated the financial strength of borrowers to determine risk and repayment capacity

### DeGroote Financial Investment Council

*Equity Research Analyst*

Hamilton, ON

*Sept 2021 – Present*

- Carefully selected as 1 of 12 students from a pool of 100+ applicants to join DFIC's Power, Utilities, and Infrastructure (PUT) investment team
- Proactively collaborated with a team of 6 other students to manage a \$100,000 portfolio comprised of Canadian & U.S. equities
- Prepared stock pitches, investment thesis overviews, as well as unique analyses during our weekly meetings, as well as to the McMaster B.O.D and industry advisors
- Built a plethora of models including a DCF, Comparable companies' analysis, and pro forma models by leveraging software's such as Bloomberg, Refinitiv, IBIS World, Excel, and PowerPoint.

### McMaster 3FI3 – Options & Futures Trading

*Mock Fund Manager*

Burlington, ON

*October 2021 – December 2021*

- Oversaw a personal \$1,000,000 USD & \$1,000,000 CAD portfolio with the objective of investing in major securities while actively hedging risk using options and futures
- Made an overall \$376,000 USD or 19% gain on the entire portfolio in a 3-month period, 243% annualized.
- Learned how to actively utilize different financial instruments such as futures, and options in order to effectively hedge against downside risk while not cutting too much upside
- Actively engaged in live trading sessions against classmates trying to maximize profit trading financial instruments ranging from Stocks, Bonds, Futures, Options, and Exchange Rates, acquiring 1<sup>st</sup> place out of 100 students in all sections of the course acquiring the largest amount of money at \$10.2 million CAD

### McMaster 3FB3 – Securities Analysis

*Mock Hedge Fund Manager*

Burlington, ON

*September 2021 – December 2021*

- Had to manage a client's \$1,000,000 USD & \$1,000,000 CAD portfolio while only trading securities, no underlying derivatives were allowed to be used.
- Achieved an overall gain on the portfolio of \$307,377 or 15% in a 3-month period, 233% annualized
- Learned how to hedge risk without the use of derivatives, as well as using extensive industry & security analysis in order to select which securities to invest in.

## ADDITIONAL INFORMATION

- **Certifications:** Financial Engineering & Risk Management Specialization (Columbia), IMFx FMAx Financial Market Analysis (International Monetary Fund), Forecasting Financial Markets (Yale University), Bitcoin & Cryptocurrency Technologies (Princeton), Bloomberg Market Concepts
- **Skills:** Fluent in English & Romanian, Basic business vernacular in Spanish (Arabic and German are underway)
- **Modelling:** Completed Wall Street Prep course covering valuation, and McMaster financial modelling course
- **Computer:** Proficient in Excel, PowerPoint, Bloomberg and Refinitiv
- **Additional Awards:** McMaster and DeGroote School of Business Award (\$2,000)
- **Interests:** Working out, Chess (1500 Rating), Soccer, Travelling, Video Games, Hiking



# Ethan Zhang

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## EDUCATION

### McMaster University – DeGroote School of Business

*Honours Bachelor of Commerce, Area of Focus: Finance (Minor in Economics)*

- **Academics:** Entered Level 2 Honours Commerce Program with 4.0 GPA
- **Relevant Courses:** Organizational Behavior (A+), Information Systems in Business (A+)

**Hamilton, Ontario**

*Expected Graduation 2024*

### Queen's University

*Honours Bachelor of Arts (Applied Economics)*

- **Awards:** Queen's University Excellence Scholarship (2019); Dean's Honours List (2019 – 2021)
- **Certification:** Certificate in Business
- **Relevant Courses:** Managerial & Financial Accounting (A+), Micro & Macroeconomics (A+) and Mathematical Economics (A+)

**Kingston, Ontario**

*September 2019 – June 2021*

## PROFESSIONAL EXPERIENCE

### RBC Capital Markets

*Corporate Access Summer Analyst*

- Scheduled to complete a 16-week internship at RBC Capital Markets on the Corporate Access team for Summer 2022

**Toronto, Ontario**

*May 2022 – August 2022*

### T&T Supermarket

*Store Associate*

- Maintained product freshness and followed food safety regulations by collaborating with group members across different work sections on a daily basis to boost sales by 30% within the first month

**Richmond, British Columbia**

*May 2020 – August 2021*

## LEADERSHIP EXPERIENCE

### DeGroote Finance & Investment Council

*Investment Analyst (Diversified Industries Group)*

- Selected to work with a team of 35 students to manage a \$100K portfolio of Canadian and U.S. equities on behalf of Fidelity Investments
- Performed detailed bottom-up fundamental analysis of current and prospective holdings through discounted cash flows analysis, comparable companies, and precedent transactions subsequently developing strong capabilities in Bloomberg, Excel, and PowerPoint
- Collaborated with a team of 7 students to prepare stock pitches and investment recommendations to present at DFIC meetings to a panel of industry professionals

**Hamilton, Ontario**

*September 2021 – Present*

### Association of Canadian Intercollegiate Investment Clubs (ACIIC)

*Equity Analyst*

- Worked with a team of six students from the McMaster Chapter to prepare stock pitches and equity analysis to present to a panel of industry professionals
- Performed and presented detailed bottom-up fundamental analysis of prospective companies through DCF modeling, comparable multiples, and qualitative methods, developed strong capabilities in Bloomberg, Refinitiv, Excel, and PowerPoint

**Hamilton, Ontario**

*September 2021 – Present*

### Mac AI Ventures

*Associate Consultant*

- Worked in a pre-incubator program to help support new McMaster-led ventures and provide pro bono valuation and industry research services to technology focused start-ups with a focus on those operating within the artificial intelligence space
- Demonstrated strong oral and written communication skills through working with clients from various backgrounds and through managing projects both independently and within the larger consulting team
- Co-hosted informational events to educate the member base and strengthen its relation with the club

**Hamilton, Ontario**

*September 2021 – Present*

## ADDITIONAL INFORMATION

- **Languages:** Native proficiency in English and Mandarin
- **Software:** Proficient in Microsoft Office Suite, Bloomberg, Thomson Reuters, Capital IQ
- **Course Completed:** Successfully completed “Building a Financial Model (of a company)”, “Capital Market Overview” and “Finance Interview Preparation” with The Marquee Group 2022
- **Interests:** Swimming (National Lifeguard Certification), Scuba Diving (Diver Certification), Traveling (Completed trips to countries across Europe, Asia and North America), Cooking (Asian Cooking and Baking) and Sci-Fi



# DEGROOTE FINANCE & INVESTMENT COUNCIL

Events



# Ahsan Mazhar

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## EDUCATION

### McMaster University – DeGroote School of Business

*Honours Bachelor of Commerce with a Minor in Computer Science*

**Hamilton, ON**

*Expected Graduation 2024*

- **Academics:** Cumulative GPA of 3.7/4.0
- **Awards:** Deans' Honour List (2020 - 2021), 1<sup>st</sup> Place at Experience Ventures National Hackathon (2022)
- **Certifications:** Bloomberg Market Concepts and Adobe Certified Associate in Visual Design using Adobe Photoshop

## PROFESSIONAL EXPERIENCE

### Toronto Kidz Summer Camp

*Camp Assistant*

**Toronto, ON**

*August 2021 – August 2021*

- Utilized leadership and interpersonal skills to supervise a group of up to ten children, receiving positive feedback from parents and the camp supervisor
- Demonstrated attention to detail by disinfecting all high-touch areas of the location in adherence to COVID-19 guidelines, ensuring a safe and clean camp environment for children to interact with
- Showcased ability to work independently by setting up art activities in specified areas ahead of children entering the camp site, ensuring smooth execution of the camp's agenda

### PharmAchieve

*Video Editor*

**Toronto, ON**

*August 2019 – September 2019*

- Edited and mastered 30+ PharmAchieve video lectures using DaVinci Resolve, enhancing the overall quality of each lecture through trimming video length and colour correction
- Independently troubleshooted and self-supervised technical issues associated with DaVinci Resolve, saving time for management to focus on other tasks
- Provided constructive feedback on lectures and promotional videos, saving coworkers 2+ hours of revisions.

## LEADERSHIP EXPERIENCE

### Mac AI Ventures

*Director of Marketing*

**Hamilton, ON**

*May 2021 – May 2022*

- Effectively developed sponsorship packages and all promotional materials while complying with Mac AI's Brand Guide, resulting in brand consistency through creative design strategies and strong attention to detail
- Published and edited Mac AI Ventures' first podcast "Fireside Chats", increasing total engagement on Mac AI Ventures' social media pages by 25% from the previous year
- Maintained and updated web page with current information using WebFlow's Content Management System (CMS), increasing target audience engagement by 12% from the previous year through SEO best practices

### Collegiate DECA McMaster

*Vice President of Marketing*

**Hamilton, ON**

*April 2021 – April 2022*

- Developed organization skills by designing sponsorship and event packages along with all promotional materials using Canva, leading to an increase in engagement on social media pages by 40% over 90 days
- Utilized Instagram Analytics and SMO best practices to make data-driven decisions, increasing total followers by 27% over 90 days
- Displayed strong communication skills by ensuring extensive live coverage on social media of all events such as McMaster DECA Case Competition and other chapter events, resulting in increased awareness of events

### DeGroote Commerce Society

*Content Creator*

**Hamilton, ON**

*April 2021 – April 2022*

- Designed posters, banners, and other graphic materials for print and social media using Adobe Creative Cloud and Canva, leading to an overall increase in engagement among all social media platforms
- Lead graphic designer for the "DeGroote Culture" merchandise line. Created designs for t-shirts and hoodies using Adobe Illustrator, generating over \$700 in profit

## ADDITIONAL INFORMATION

- **Software:** Bloomberg, MS Office, MS Outlook, G-Suite, HubSpot, Slack, Adobe Creative Cloud, Canva, DaVinci Resolve
- **Activities:** Vice President of Marketing for Collegiate DECA Canada, Director of Marketing for DeGroote Finance and Investment Council (DFIC), Second Year Representative for DeGroote Commerce Society
- **Interests:** Soccer, Cricket, Machine Learning, Podcasts (FT News Briefing, How I Built This, The Breakfast Club)

# Yazan Abu Isheh

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## EDUCATION

### McMaster University – DeGroote School of Business

Hamilton, ON

*Honours Bachelor of Commerce*

*Expected Graduation 2024*

- **Academics:** Cumulative GPA of 3.8/4.0
- **Awards:** Deans' Honour List (2020 - 2021), Presidents Award (2019 – 2020)
- **Relevant Coursework:** Corporate Finance, Managerial Finance, Financial Accounting, Managerial Accounting, Applied Statistics

## PROFESSIONAL EXPERIENCE

### Segma Inc.

Toronto, ON

*Ecommerce Marketing and Managerial Accounting*

*October 2018 – Present*

- Engaged in the accounting department, data to entry and accounts receivables
- Assisting with inventory management, shipping and receiving
- Conversed with customers in real-time, accommodated customer needs and consistently improved quality of service
- Contributed to website management and tracked consumer behavioral trends

## EXTRACURRICULAR ACTIVITIES

### Marketing Associate & Podcast Editor

Hamilton, ON

*Degroote Finance Investment Council*

*June 2021 – June 2022*

- Collaborating with DFIC members and planning University events, which include dances, holiday activities, competitions, and sports team buyouts
- Responsible for website management and editing DFIC podcasts

### Provincial Competitor

Toronto, ON

*DECA Ontario Business Competition*

*October 2018 – Present*

- Participating in presentations and conversations with the purpose of approaching situations in a business case
- Encouraged my peers to offer ideas in order to solve business cases

### Competitive Senior Swimmer

Hamilton,

ON

*Swim Team, Saltfleet Secondary High School*

*September 2016 – June 2020*

- Three years of swimming with HAC has strengthened my leadership skills and overall confidence
- Achieved multiple SOSSA and OFSAA qualifications throughout my High School career

## VOLUNTEER ACTIVITIES AND INTERESTS

- Kickboxing – Coach Assistant since 2017. Leading a class is part of the advanced level requirement which also improves my leadership skills.
- Swimming Assistant (2016 – 2019) – Due to my experience of swimming with HAC, helping the school swim team coach demonstrate techniques and strategies benefited new swimmers
- Contributed towards Mosque Charity events since 2018. Sold food and drinks at the local mosque to donate towards poor countries
- Took part in marketing meetings while working at United Weavers since 2018. I gained an understanding of how market research is made and how marketers reach out to their target markets
- Encourage Instagram followers and viewers by posting weekly inspirational quotes since 2019

## CAREER RELATED SKILLS

- Fluent in Arabic, both oral and written communication
- Intermediate level of proficiency in Microsoft Word, PowerPoint, Excel and Publisher
- Strong understanding of literature portrayed through OSSLT prep classes (Coach assistant)
- Passionate Presenter as a student parliament events coordinator
- Motivational Speaker through swim coaching and religious teachings
- Creative through the production of DFIC event posts and website modification

# Rick Chang

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## EDUCATION

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### McMaster University – DeGroote School of Business

*Bachelor of Commerce*

**Hamilton, ON**

*Expected Graduation 2025*

- **Academics:** Cumulative GPA of 3.7/4.0
- **Awards:** Deans' Honour List (2021 - 2022)
- **Relevant Coursework:** Marketing, Financial Accounting, Business Data Analytics, Macroeconomics, Microeconomics

## PROFESSIONAL EXPERIENCE

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### DeGroote Finance and Investment Council

*Analyst*

**Hamilton, ON**

*October 2021 – Present*

- Summarized economic, political, and financial market news to produce an informative newsletter to 500+ readers
- Updated excel data weekly to produce accurate charts and figures included in the newsletter
- Participated in trading simulations and networking events with industry professionals

### Hutch's Harbour Front

*Line Cook*

**Hamilton, ON**

*April 2019 – September 2021*

- Supervised and trained new employees to prepare high-quality dishes promptly
- Followed methods for safe food preparation, assembly, and presentation for 20+ dishes
- Resolved issues promptly and in a professional manner

### Danasy Landscaping and Maintenance

*Team Member*

**Hamilton, ON**

*May 2022 – May 2022*

- Worked independently and with team members under harsh outdoor conditions
- Transformed and maintained a variety of plant and tree types and ground features
- Operated hand tools, power mowers, blowers, and other machinery efficiently to achieve desired results

## LEADERSHIP EXPERIENCE

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### James North Baptist Church

*Group Leader*

**Hamilton, ON**

*October 2019 – Present*

- Fostered name-based relationships with 30+ students which boosted weekly attendance
- Organized weekly gym activities to build a fun and welcoming environment for participants
- Provided in-depth feedback to church leaders to continually improve programs to fit the needs of the community

### Hess Street Elementary School

*Basketball Coach*

**Hamilton, ON**

*December 2017 - April 2018*

- Planned drills and exercises for basketball training sessions to improve basketball skills of 20+ students
- Coached and advised 15 students during basketball games resulting in playoff contention
- Closely mentored 5 students to encourage positive behaviour and excellence in classrooms and communities

## ADDITIONAL INFORMATION

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- **Software:** Bloomberg Terminal, Microsoft Office, Microsoft Outlook, Canva, Notion, Zoom
- **Additional Awards:** McMaster and DeGroote School of Business Award (\$6,000)
- **Interests:** Chess, Basketball, Cooking, Writing, History, Podcasts, Reading (The Psychology of Money, Start with Why)

# Kira Cherevaty

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## EDUCATION

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### McMaster University – DeGroote School of Business

*Honours Bachelor of Commerce*

**Hamilton, ON**

*Expected Graduation 2024*

- **Academics:** Cumulative GPA of 3.9/4.0
- **Awards:** Deans Honours List 2021, Vale Canada Reserve Scholarship (\$9,000)

## PROFESSIONAL EXPERIENCE

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### National Bank

*Debt Capital Markets Intern*

**Montreal, QC**

*Upcoming Summer 2022*

### General Bread & Pastry

*Apprentice Baker*

**Hamilton, ON**

*May 2021 – December 2021*

- Effectively managed time to mix, weigh, shape, proof and bake over 800 buns a shift delivered to Hamilton wholesale clients meeting expected delivery times
- Ensured health and safety standards in the bakery providing a safe and clean work environment, allowing work to be completed without interference
- Utilized self-motivation and proactivity to work alone in creating buns, baking precisely and accurately each shift to receive near identical products meeting client expectations

### Starbucks

*Barista Trainer / Barista*

**Hamilton, ON**

*May 2019 – September 2021*

- Prepare individualized drink requests and memorize over 100+ beverage recipes while providing creative suggestions to meet customer preferences, increasing customer satisfaction and sales
- Coached new employees by demonstrating best practices and giving directions to enable new team members to contribute within the first month of joining the team
- Boosting customer connections through active communication and listening to amplify a positive work environment and to retain loyal customers who are pleased with each visit

### East Side Mario's

*Line Cook*

**Hamilton, ON**

*November 2018 – April 2019*

- Strategically managed time while working in sauté station making over 15 varieties of dishes per shift in a fast-paced scenario, delivered to more than 50 tables a night
- Collaborated with line cooks and supervisors by coordinating customer tables decreasing customer wait times

## LEADERSHIP EXPERIENCE

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### Analyst, Newsletter

*DeGroote Finance and Investment Council*

**Hamilton, ON**

*Fall 2021 - Present*

- Collaborated with fellow analysts to assemble weekly market newsletters distributed to over 500 readers
- Effectively analyze and report significant weekly articles surrounding changes in markets, politics and economics keeping readers up to date and informed of current processes-
- Closely observes and searched Bloomberg for the largest most recent M&A transactions and gathered up to date data on equities, fixed income, currencies and commodities

### Debits and Credits Case Competition

*DeGroote Accounting Association*

**Hamilton, ON**

*November 2021*

- Utilized problem solving skills in an accounting-based case challenge to determine which monetary decisions would best benefit both parties involved, maximizing their income
- Prioritized and organized time in a team of two to evaluate the case within 24 hours to display the strategy chosen to a panel of judges clearly and confidently, achieving second place

## ADDITIONAL INFORMATION

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- Analyst on DeGroote Finance and Investment Council 2021/2022, Member of DeGroote Accounting Association 2021/2022,
- Good Shepard's Youth Shelter (Remote Baker, Volunteer) from January 2021 to June 2021, Good Shepard's Men Shelter (Food preparation, Volunteer) from October 2019 to March 2020,
- French Immersion Certificate
- Passionate about hockey, playing girls competitive from 2016 to 2020

# Rhea Sandhu

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## EDUCATION

### McMaster University – DeGroote School of Business

*Honours Integrated Business and Humanities*

**Hamilton, ON**

*Expected Graduation 2024*

- **Academics:** Cumulative GPA of 3.9/4.0
- **Awards:** Deans' Honour List (2020-2021)
- **Relevant Coursework:** Corporate Finance, Managerial Finance, Financial Accounting, Managerial Accounting, Statistics

## PROFESSIONAL EXPERIENCE

### Banana Republic

*Sales Associate, Cashier*

**Mississauga, ON**

*March 2021 – Present*

- Helped customers complete purchases, locate items, and join rewards programs to promote loyalty, satisfaction, and sales numbers
- Promoted customer loyalty and exceeded sales quotas through the deliverance of friendly service and knowledgeable assistance
- Implemented effective sales strategies, leading to 120% achievements of sales targets for 2021

### DeGroote Finance and Investment Council

*Private Markets Analyst, Internal Relations Director*

**Hamilton, ON**

*September 2020 – Present*

- Proposed research and data and assembled reports on potential investment opportunities
- Investigated and analyzed economic trends, equity, companies, and financial statements and came to conclusions concerning the examination
- Ensured members of the organization are kept informed and motivated by communicating through several channels, such as a team. channels, email bulletins, social media and regular newsletters.

### Popular Tire

*Operations/Finance Intern*

**Mississauga, ON**

*June 2020 – August 2021*

- Performed financial statement analyses on monthly business summary reports and dashboard recaps, analyze product comparable percentages and rates for managers to increase efficiency and provide solutions
- Presented and implemented recommendations incorporating how to effectively optimize company cultures together
- Maintain and build relationships with numerous customers and contractors, providing exceptional customer service and efficient deliveries

## LEADERSHIP EXPERIENCE

### Leukemia Lymphoma Cancer Society of Canada

*Group Coordinator, Volunteer*

**Toronto, ON**

*May 2021-Present*

- Coordinated and managed groups for fundraising events such as Team in Training, Light the Night Walk and School & Youth Programs
- Responsible for leading advocacy events and meetings to local legislators and sponsorship coordinators
- Maintained relationships with head leaders to oversee office support and provide recommendations for additional fundraising

### TEDxMcMasterU

*Sponsorship Coordinator*

**Hamilton, ON**

*September 2020 – April 2020*

- Managed existing sponsors and secured new sponsors for various events
- Assisted in preparation of proposals, including formatting proposal documents, assembling complex proposal packages, prospect tracking, and coordinating delivery

### North Mississauga Soccer Club

*Girls Rep A Soccer Team Captain*

**Mississauga, ON**

*April 2016 – August 2020*

- Effectively communicated with a diverse group of athletes, coaches, and game officials to ensure a fair and respectable sports culture
- Developed concentration, strong work ethic, and perseverance to meet personal and team goals for a successful season
- Balanced a full academic course load with competition, practices, training sessions, and meetings

## ADDITIONAL INFORMATION

- **Software:** Microsoft Office, Microsoft Outlook, G-Suite, Canva, Slack, ZoomInfo
- **Additional Awards:** McMaster University Entrance Award (\$1000), DeGroote School of Business Entrance Award (\$1,000)
- **Interests:** Hiking, Reading, Cooking, Hockey, Soccer, Volleyball, Woodwork, Podcasts

# Michael Long

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## EDUCATION

### McMaster University – DeGroote School of Business

Hamilton, ON

*Honours Bachelor of Commerce, Level III*

*Expected Graduation 2023*

- **Academics:** Cumulative GPA of 3.8/4.0
- **Awards:** Deans' Honour List (2019 - 2020), (2020-2021)
- **Relevant Coursework:** Intermediate Financial Accounting I & II (A), Managerial Finance(A+), Applied Statistics(A+)

## PROFESSIONAL EXPERIENCE

### Ernst & Young

Toronto, ON

*Assurance Intern*

*May 2022 – August 2022*

- Incoming assurance intern for a 16-week term to preferably focus on servicing public companies

### Sound Insurance Services Inc.

Toronto, ON

*Accounting Intern*

*May 2021 – August 2021*

- Managed daily cash, cheque, credit card, and e-transfer deposits from clients up to \$150,000 while preparing corresponding journal entries matching the payments with the correct client's premium and sales tax to keep record of each business transaction
- Executed cash disbursements by either preparing, and printing physical broker cheques or through an EFT while double checking that the funds are payable to the correct entity
- Precisely reconciles company's commission statements ensuring commission received match what has been reported, while detecting, and resolving billing discrepancies such as commission percentage errors, and unbilled policies

### Metro

Toronto, ON

*Front End Clerk*

*June 2017 – May 2021*

- Trained new employees for the courtesy clerk position by communicating the specific job requirements to each new employee and with specific performance advice, thereby supporting oncoming team members to achieve success in their new role
- Screened and monitored employees and vendors for Covid-19 related precautions to maintain a safe store environment ensuring the company's ability to continue operations while complying with Toronto's Covid-19 regulations

## LEADERSHIP EXPERIENCE

### DeGroote Finance and Investment Council

Hamilton, ON

*Finance Associate*

*April 2021 – Present*

- Analyzed previous years' financial statements and other relevant materials to forecast club expenditures and revenues for the 2021-2022 academic year, to create an annual club budget that was successfully approved for \$2,200 of funding
- Communicated with club executives to advise on the planning and implementation of workshops, panels, and other events

### Investa Insights

Hamilton, ON

*Investment Analyst*

*April 2021 – Present*

- Analyzed the merger of Warner Media and Discovery as part of a television media industry report, covering the deal structure and future outlooks of the newly formed company that is positioning itself to be a leader in the direct-to-consumer market
- Effectively collaborated with team members during market research report by arranging meetings to receive and delegate specific tasks, as well as to assist any team members with formatting or specific content questions to enable greater synergy within the group

### St. Bonaventure Softball League

Toronto, ON

*Coach*

*May 2015 – July 2019*

- Actively led team practices and games for elementary students ages 10 to 13 with a focus on promoting fun, teamwork, and safety to ensure that each student had a positive experience with both the physical and social aspects of the sport
- Communicated game rules and performance technique in a concise and simplistic way to allow the younger students to have stronger understanding of instructions, thereby leading to improvements in each student's batting, fielding, and throwing abilities

## ADDITIONAL INFORMATION

- **Software:** Microsoft Office G-Suite, Total Asset Management (TAM), Bloomberg Terminal, ZoomInfo, Slack
- **Additional Awards:** McMaster and DeGroote School of Business Admission Award (\$750), Michael Thomson Award (\$500)
- **Activities:** Intramural Sports (Basketball, Volleyball, Flag football), Playing Cards (Poker, Crazy 8's, Wizard)
- **Interests:** Baseball (Blue Jays), Fantasy Football, Podcasts (Wall Street Breakfast, JRE Experience, Reality Tv (The Bachelor)



# Jeffrey Howson

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## EDUCATION

### McMaster University – DeGroote School of Business

**Hamilton, ON**

*Honours Bachelor of Commerce in Finance (Economics Minor)*

*Expected Graduation 2023*

- **Academics:** Cumulative GPA of 3.9/4.0
- **Awards & Scholarships:** 1st Place – RBC Capital Markets Challenge, 2nd Place – DFIC Stock Pitch Competition, Finalist – McGill ESG Stock Pitch Competition, Dean's Honour List (2019, 2020), DSB Entrance Award (2019)
- **Teaching Assistant:** COMM 2FA3 – Corporate Finance, COMM 1AA3 – Financial Accounting

## PROFESSIONAL EXPERIENCE

### RBC Capital Markets

**Toronto, ON**

*Global Investment Banking Summer Analyst*

*May 2022 – Present*

- Scheduled to complete a 14-week internship at RBC Capital Markets within the Global Investment Banking division.

### Coldwater Corporate Finance Inc.

**Toronto, ON**

*Analyst, Mergers & Acquisitions*

*November 2020 – April 2022*

- Valued private Canadian companies from a sell-side mandate through comparable company and precedent transaction analysis.
- Researched and screened potential financial sponsors and strategic buyers for clients using Capital IQ and online sources.
- Built a new financial model template used for 10+ client models in Excel; auto-linked graphs and visuals for use in CIMs, mapped working capital for normalizations, and crafted sensitivity and scenario analysis to project future performance.
- Frequently created pitchbooks and marketing materials for clients, including a \$14M software consulting company, a \$11M glass glazing company, and a \$10M custom powder coating company.

### Royal Bank of Canada

**Toronto, ON**

*Financial Analyst, Capital Policy & Interpretation*

*May 2021 – Present*

- Created presentations on month-over-month variance in regulatory capital, proportionate changes in the CET1 Ratio, and return on equity, ensuring medium and long-term performance objectives were being met.
- Developed a model to calculate and forecast operational risk and its impact on capital allocation across lines of businesses including Capital Markets; contributed to a projected \$2B in savings for risk-weighted capital by 2022.

## LEADERSHIP EXPERIENCE

### DeGroote Finance & Investment Council (DFIC)

**Hamilton, ON**

*Director of Mentorship*

*May 2022 – Present*

- Scheduled to lead DFIC's formal mentorship program for a cohort of ~20 first-year students in the upcoming Fall/Winter semesters

*Vice President, Private Markets*

*September 2020 – April 2022*

- Covered North American private equity & venture capital deal activity through transaction analysis; researched Apollo's \$1.9B acquisition of Great Canadian Gaming, analyzing rationale, growth, and LBO analysis implying a 24% IRR and 2.9x MOIC.
- Initiated a pro-bono consulting partnership with FirePower Capital's private capital arm, performing company and industry research, and sourcing of potential acquisition targets.

### Investa Insights

**Hamilton, ON**

*Co-Head, McMaster Chapter*

*July 2020 – Present*

- Prepared stock pitches, market research reports, and transaction analysis to invest in North American equities; built valuation models including discounted cash flow and comparable company analysis to make value-focused investments.
- Developed and ran a summer training program for 10 student analysts and 2 junior portfolio managers at the McMaster Chapter.

## ADDITIONAL INFORMATION

- **Languages and IT Skills:** French (fluent), Bloomberg, Capital IQ, Refinitiv
- **Activities:** CFA Society Toronto (Student Ambassador), Greensuit (Welcome Week Representative), Ontario Legislative Page Program, McMaster Intramural Leagues (Soccer and Dodgeball)
- **Interests:** Music (Guitar, Piano, Violin), Chess, Hiking, Snowmobiling, Philosophy (Stoicism)

# Manrose Dhaliwal

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## EDUCATION

### McMaster University – DeGroote School of Business

Hamilton, ON

*Honours Bachelor of Commerce Level II*

*Expected Graduation 2024*

- **Academics:** Cumulative GPA of 3.9/4.0
- **Relevant Coursework:** Managerial Accounting, Financial Accounting, Decision Making with Analytics, Applied Statistics, Finance
- **Awards:** Dean's Honours List, Golden Key (Top 15% of program), Schulich Leader Scholarship Nominee
- **Area of Focus:** Finance

## PROFESSIONAL EXPERIENCE

### Peel District School Board

Mississauga, ON

*Facilities and Environment Support Summer Intern*

*July 2021 – September 2021*

- Analyzed energy consumption data of over 250 schools to identify areas of improvement on energy savings and waste diversion
- Developed and used macro-embedded Excel spreadsheets in order to update and maintain databases
- Located and uploaded data on energy-saving opportunities to be shared with facilities staff

### DryShip Logistics

Brampton, ON

*Accounts Receivable Assistant*

*July 2020 – July 2021*

- Prepared and processed financial documents including invoices, bills, and accounts payable and receivable
- Responded to client inquiries about logistical services and solved issues in order to ensure client satisfaction
- Utilized Microsoft Excel to submit reports to corporate offices as appropriate

## LEADERSHIP EXPERIENCE

### DeGroote Finance & Investment Council

Hamilton, ON

*Newsletter Analyst*

*September 2021– Present*

- Analyzed and summarized recent news articles on topics such as markets, economics, politics, and technology
- Utilized Bloomberg Terminal to extract data and import it onto Microsoft Excel, including US and Canada Treasury Yields, currencies and commodities
- Examined large market transactions (M&As, IPOs, or SEOs) through Bloomberg Terminal

### AIESEC McMaster

Hamilton, ON

*Team Leader of Incoming Global Talent*

*May 2021 – Present*

- Created virtual exchange opportunities for international students by contacting and building rapport with managers of Hamilton local businesses to sell AIESEC's program
- Tracked the performance of participating businesses with Salesforce and led monthly meetings with managers of participating businesses to ensure high-performance among AIESEC students
- Recruited international AIESEC exchange participants by uploading and promoting virtual opportunities, shortlisting candidates, conducting company interviews, and selecting and matching the candidates

*Talent Management and Finance Portfolio Member*

*January 2021 – May 2021*

- Initiated and organized team events, building communication and engagement among members
- Delegated responsibilities to team members, increasing efficiency in completing tasks and reducing overlapping duties
- Presented in weekly meetings, resolving issues with members and seeking feedback to improve team relations
- Budgeted organization's funding, forecasting revenues and expenses of the separate portfolio teams

### Lorax Canada

Hamilton, ON

*Vice President of Events*

*January 2021 – Present*

- Collaborated with group members to coordinate a high school volunteer program to encourage students to innovate applicable solutions for regional climate-related concerns
- Formulated and executed ideas for fundraisers, exceeding revenue goals by 6%
- Developed detailed event plans and managed internal and external communications to organize club events

## ADDITIONAL INFORMATION

- **Software:** Microsoft Office (Word, Excel, Powerpoint), Microsoft Outlook, Salesforce, Bloomberg Terminal, Canva, Thinkific
- **Activities:** 2SLGBTQ+ Focus Group Moderating, HomeShare Alliance Course Content Creating, MacChangers Change-a-Thon Infrastructure Team Contributing
- **Interests:** Painting, Acting, Music (Guitar and Piano), Cooking, Philosophy (Metaphysics), Practicing Mindfulness