

EDUCATION

Tulane University, A.B. Freeman School of Business
Bachelor of Science in Management
Major: Finance; Entrepreneurship Specialization
St. Mark's School

New Orleans, LA
May 2023

Southborough, MA

WORK EXPERIENCE

Barclays Investment Bank

Equity Research Assistant Vice President

New York, NY
July 2023 – Present

- Cover and produce research for a 30+ name equity universe across LatAm Consumer/Multi-Industry and Americas Agribusiness, analyzing earnings drivers, pricing, volume/mix, FX, input costs, competitive dynamics, capital structure, liquidity, and country risk
- Serve institutional clients directly – fielding inquiries, engaging in investor discussions, and producing bespoke research on earnings, valuation, catalysts, and risk
- Identify differentiated, forward-looking catalysts through primary diligence, including management meetings, distributor/retailer and supply-chain monitoring, on-the-ground checks, regulatory tracking, and competitive analysis
- Lead earnings previews, reviews, and real-time post-print analysis – isolating key drivers, quantifying deviations versus consensus, identifying inflections, and framing near- and long-term risk/reward
- Build and maintain full forecasting and valuation frameworks, including three-statement models, DCF, SOTP, comps, volume/mix/price analysis, cost bridges, unit economics, and scenario cases
- Develop thematic, sector-, and country-level research across consumption, agricultural supply dynamics, trade policy, labor, margins, FX, and country risk, linking macro and industry developments to company earnings and equity performance
- Produce a weekly sector note for Sales & Trading covering equities, macro, positioning, dislocations, relative-value opportunities, and key catalysts for traders and institutional clients

Bank of America

Strategy & Business Ventures Summer Analyst

Boston, MA
June 2021 – August 2022

- Researched prospective fintech and retail ecosystem acquisitions and strategic partnerships for the Business Acceleration team – running competitive benchmarking, addressable-market sizing, integration fit/synergy, unit economics, client acquisition, and growth-runway assessment
- Conducted analytics for the Business Intelligence group, evaluating product profitability, client segmentation, and cross-sell opportunity

ACADEMIC INVESTMENT RESEARCH & PORTFOLIO MANAGEMENT

Darwin Fenner Student Managed Fund

Stock Analyst

New Orleans, LA
January 2023 – May 2023

- Selected for a faculty-nominated, ~20-student investment research program managing a \$6mn long-only equity portfolio within the school's endowment
- Covered S&P 600 Information Technology, building company and sector models and developing investment theses through fundamental analysis, KPI tracking, factor analysis, and valuation screening
- Monitored existing small-cap technology holdings and recommended changes in position sizing based on evolving fundamentals, valuation, and risk/reward
- Presented investment recommendations to the full program, defending each thesis ahead of portfolio inclusion votes
- Landed all three recommendations – ViaSat, Fabrinet, and Knowles Corporation – each delivering triple-digit returns to date

Burkenroad Reports

Equity Research Analyst

New Orleans, LA
August 2021 – December 2021

- Participated in a nationally recognized equity research program, with reports distributed to 20,000+ investors and featured by major financial media outlets
- Conducted full-cycle fundamental research on RPC, Inc., including SEC filing analysis, C-suite interviews and company visits, KPI and earnings modeling, cash flow forecasting, peer benchmarking, and valuation analysis

LICENSES, TECHNICAL SKILLS & PERSONAL INTERESTS

- Design and develop AI models and agentic tools for investment research, market analysis, and trading workflows
- Bloomberg Terminal, Bloomberg ESG Certification, Bloomberg Market Concepts Certification
- FINRA: SIE, Series 63, Series 86, Series 87
- Microsoft Excel Certified; advanced proficiency in Microsoft 365
- Interests: Personal investing, road cycling, squash, and golf