Bob Sheehan, CFA, CMT | Macro Analyst | Investment Strategist | Data Scientist

240-672-7418 | bobsheehan23@gmail.com | linkedin.com/bob-sheehan-cfa-cmt/ | LighthouseMacro.substack.com | x.com/lhmacro

PROFILE

Macro Analyst & Investment Strategist with proven success managing multi-asset and equity portfolios. Known for:

- Transforming complex economic data into digestible investment theses through empirical analysis

- Identifying market opportunities through proprietary research combining macro & technical analysis

- Sharing investment commentary on LinkedIn as well as via Lighthouse Macro on Substack and X/Twitter

- Chartered Financial Analyst (CFA) & Chartered Market Technician (CMT)

CORE COMPETENCIES & TECHNICAL SKILLS

Investment Strategy, Macroeconomics, Portfolio Management, Equity Research, Cross-Asset Trading, Tactical Asset Allocation, Python, Technical Analysis, Economic Data Analysis, Forecasting, Data Visualization, Statistical Analysis, Machine Learning, Predictive Modeling, FactSet, Bloomberg, TradingView, Microsoft Excel, SQL

PROJECTS

Macro Strategist | Lighthouse Macro | lighthousemacro.substack.com, x.com/lhmacro

- Sharing investment insights focusing macro & technical analysis to a growing audience

Data Scientist | Macro & Markets | github.com/bobsheehan23

- Applied predictive modeling & machine learning techniques to macroeconomic variables to create a multi-asset portfolio that outperformed traditional asset allocation models over time with improved Sharpe Ratios

EDUCATION

BrainStation | Diploma, Data Science

APR 2024 – JUL 2024, NEW YORK, NY

Providence College | Bachelor of Science in Finance, minor in Economics; Member of Division 1 Men's Lacrosse Team, 4x Big East All Academic, Chi Alpha Sigma National Collegiate Student-Athlete Honor Society
SEP 2011 - MAY 2015, NEW YORK, NY

PROFESSIONAL EXPERIENCE

Senior Research Analyst | Strom Capital Management LLC

JUL 2024 – PRESENT, NEW YORK, NY

- Providing macro analysis and data science solutions in direct collaboration with the Founder & CIO to identify the strongest trading opportunities that align with the fund's global macro strategy.

- Assist in the writing of daily & weekly letter sent to all the fund's investors as well as prospective clients.

Institutional Research Sales | Trahan Macro Research

NOV 2021 - JUL 2022, NEW YORK, NY

- Delivered macro research to some of the world's largest hedge funds, pensions funds and asset managers.

Associate Portfolio Manager | Bank of America Private Bank

JUL 2015 - JUN 2021, NEW YORK, NY

- Served as a key member of investment team with unique dual mandate managing both global, multi-asset portfolios with $4.5B AUM as well as a proprietary Large Cap Equity Strategy of $800M AUM

- Analyzed macroeconomic and financial market data efforts to inform investment decision making, with a focus on leading the team's macro research & technical analysis efforts advising portfolio strategy & trading decisions

- Presented investment commentary, portfolio strategy, asset allocation decisions, and portfolio updates through a variety of communication mediums to both technical and non-technical stakeholders