

Bob Sheehan, CFA, CMT | Data Scientist

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EXECUTIVE SUMMARY

- Skilled investment research and portfolio management professional with a particular passion for macro research and its application in the portfolio management process.
- Data-driven analyst with extensive experience transforming financial data into actionable investment insights.
- Dual CFA & CMT Charterholder demonstrating unique analytical skillset.

Skills – SQL, Python, Excel, Investment Analysis, Macroeconomic Research, Portfolio Management, Trading, etc.

WORKPLACE EXPERIENCE

Career break:

August 2022 - Present

- I took time away for personal reasons relating to my mental health, focusing on personal growth and my well-being.
- Enrolled in Python & SQL programming courses to enhance technical skills and broaden data analysis capabilities.

Institutional Research Sales, Trahan Macro Research, New York, NY

November 2021- July

- 2022 •** Lead all Sales, Business Development, & Relationship Management efforts for coverage regions at Wall Street boutique providing thoughtful top-down analysis in Portfolio Strategy and Quantitative Research.
- Growing the client book for start-up with largest Asset Management firms, Hedge Funds, & Pensions in the world.

Associate Portfolio Manager, Coastal Bridge Advisors, Westport, CT

June 2021- September 2021

- Managed global, multi-asset class portfolios and member of firm's Investment Strategy Committee.
- Performed macroeconomic & financial market research for Investment team and disseminate to broader firm.
- Create and maintain strategic and tactical asset allocations based on current market views.

AVP, Portfolio Management Senior Associate and Equity Analyst, Bank of America Private Bank, New York, NY

July 2015- June 2021

- Lead Equity Analyst for the Strategic Growth Strategy, a Large Cap Equity strategy with \$800M AUM. The strategy utilizes fundamental, technical, quantitative, and thematic analysis.
- Provide analytical and operational oversight for a team of 3 Portfolio Managers with roughly \$4.5B in AUM.
- Analyze macro and market data from a variety of sources to inform investment decisions and positioning.
- Present on national calls to portfolio managers as well as internal calls with various investment committees.

EDUCATION

BrainStation | Diploma, Data Science

Apr 2024 – July 2024 New York, NY

Providence College, Providence, Rhode Island; BS Finance, *May 2015*; Minor: Economics

D1 Varsity Men's Lacrosse Team Member