

Marc-Antoine GADRÉ

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Seeking a 6-month internship in finance, starting in March/April

Professional Experience

Groupe La Française (Crédit Mutuel Asset Management)

Nancy, France

Assistant Portfolio Manager

January 2024-July 2024

- Analysis and recommendations on portfolio allocation
- Created and updated macroeconomic sections of client presentations
- Prepared and participated in client meetings (+150)
- Monitored markets, macroeconomic, and microeconomic news to advise on assets
- Prepared and presented company cases to include them in the investment universe

Société Générale Private Wealth Management

Luxembourg, Luxembourg

Product Marketing Specialist Assistant

March 2023-August 2023

- Design/modernization of 19 investment presentations
- Developed +150 investment proposals for private and institutional clients
- Monthly reporting on over 19 investment funds
- VBA macro to optimize fund reporting, saving 8 hours of work per month
- Prepared weekly updates on financial market news and macroeconomic trends

CIC

Saint-Pierre d'Oléron, France

Wealth Management and Reception

May 2022-July 2022

- Analyzed a portfolio of +500 clients to determine investment suitability
- Contacted clients to obtain tax assessments
- Studied tax assessments and devised tax reduction plans
- Welcomed clients, managed basic requests + upselling additional services (phone packages)
- Credit processing, document reception, executing transfer requests

Education

CFA LVL 1 candidate

CFA Institute

January 2025-November 2025

- Key courses: Portfolio Management, Equity, Fixed Income, Quantitative Methods

Kedge Business School

Bordeaux, France

MSc Banking & Finance (full English track)

September 2024-June 2026

- Key courses: Portfolio management; Equity and Fixed Income; Option, Futures and other Derivatives

Kedge Business School

Bordeaux, France

Bachelor Banking & Finance

September 2021-June 2024

- Key courses: Market Finance, Corporate Finance, Risk Management in Banking, Banking Marketing

Skills & Interests

Languages: French, native; English, fluent

Soft Skills: meticulous, adaptable, curious, excellent client relationship management

Technical Skills: VBA, Bloomberg (BMC Certification), Reuters, Microsoft Office (Excel), proficiency in financial products

Interests: basketball (competitive player), news, new technologies, portfolio management, video games