

Girish Venkateswaran

Contact: (672) 971-4098 • gv10981098@gmail.com • girishgv1098@gmail.com

Links: [linkedin.com/in/girish-venkateswaran-gv](https://www.linkedin.com/in/girish-venkateswaran-gv) • github.com/GV-98/Girish-s-Financial-Modeling-Page

PROFESSIONAL SUMMARY

Finance professional bringing 3+ years of cumulative experience in equity research, portfolio management, and investment banking. An alumnus of top American & Canadian business schools. Proficient in dataset capture & manipulation, coding, industry analysis, financial modeling, DCF/DDM/multiples/SoTP valuation, and machine learning model building. CFA Institute Level I candidate. Former national-level table tennis player in KSA. Willing to pursue IFIC, CFP, and CPA certifications. Please click on the above links to learn more!

EDUCATION

Simon Fraser University (SFU) | Master of Science in Finance Dec. 2024

- CGPA: 3.72 (Distinction)
- Investment Management Stream: coursework extensively covers CFA Institute Level I & II Material

The Pennsylvania State University (PSU) | Bachelor of Science in Energy Business & Finance May 2021

- Minor in Supply Chain & Information Science Technology, Dean's List Holder

INDUSTRY EXPERIENCE

Investment Analyst, Portfolio Management Division Dec. 2022 – Jul. 2023

Jarir Investment | Riyadh, Saudi Arabia

- Specialized in active investing of Middle East North African (MENA) stocks by analyzing financial statements, evaluating risks, and making allocation and rebalancing decisions to grow Jarir Investment's value-oriented local portfolio
- Conducted equity research, analyzed historical statements, constructed pro forma projections, and integrated these projections into DCF & DDM models. Findings and insights were presented to Portfolio Manager and Senior VP
- Provided mentorship to interns, supervised intern DCF model training, demonstrated leadership in team-based scenarios

Investment Banking Analyst Oct. 2021 – Aug. 2022

Cambridge Wilkinson | New York City (Remote)

- Created enterprise value for firms with valuations of \$5 - \$20 MM by raising capital worth \$25 - \$500 MM through private placements with a rolodex of vetted investors in a fast-paced, remote-based, 4-person team setting led by a Managing Director
- Conducted contract negotiation and due diligence, term sheet creation, client valuation, NDA and on-boarding document distribution
- Spearheaded CW's E.S.G initiative in 2021-22; On-boarded more than 10 E.S.G mission-oriented clients with proven growth potential
- Conducted client valuation using multiples and comparable analysis, DCF & DDM modeling, and collected data using PitchBook
- Responsible for intern training and preparing weekly operational and project update memos to company leadership and other bankers

Investment Analysis Intern, Portfolio Management Division Apr. 2020 – Mar. 2021

Jarir Investment | Riyadh, Saudi Arabia & Remote

- Conducted equity research and valuation on MENA-based companies; developed professional skills in a corporate setting

RELEVANT CANADIAN EXPERIENCE

Equity Analyst, Global Equities (Unpaid) Jan. 2024 – Dec. 2024

Student Investment Advisory Service (SIAS) Fund | Vancouver, BC

- Oversaw Materials Sector with current holdings exceeding CAD \$600 K within Global Equities asset class of SIAS Fund, a ~CAD 30 MM multi-asset class portfolio investing capital acquired from SFU's endowment fund
- Increased material sector returns by ~20% YTD by expertly picking value stocks that appreciated in value by ~40% YTD since selection
- Reduced immediate portfolio active risk from 3.51% to 3.46% as a result of skilled investment decisions
- Conducted routine market and equity research, collected data, prepared detailed industry and company reports, presented findings to Portfolio Manager before finalizing active stock picking decisions

Teaching Assistant, BUS 217W: Multiple Sections & Semesters Sep. 2024 – Present

Simon Fraser University | Burnaby, BC

- Grading assignments, holding office hours, facilitating discussion to foster a holistic learning environment to help students succeed

SKILLS & INTERESTS

Software & Certifications: MS Excel & Office, Python, Machine Learning, Bloomberg Terminal & Bloomberg Market Concepts Certified, PitchBook, Salesforce, SQL, C++, R, MATLAB, SolidWorks, VBA, Tableau, CompXM & CapSim Simulation

Soft Skills: Detail-Oriented, Collaborator, Leadership, Analytical, Intellectually Curious, Effective Communicator, Dependable, Quick Learner

Languages: English - IELTS Band Score of 8.5/9.0, Hindi, Bengali, Arabic, Tamil

Activities: Power lifting, Sightseeing, Foodie, Astronomy, Science, Monthly Philanthropy, Volunteering, Personal Investing, Guitar

Interests: Table Tennis, Formula 1, Cars, Animal Lover, Sci-Fi, Art Museums, Poker, Ancient History, Rocket League, Philosophy, Audiophile