

Girish Venkateswaran

Contact: (672) 971-4098 • gv10981098@gmail.com / girishgv1098@gmail.com • gva12@sfu.ca

LinkedIn: [linkedin.com/in/girish-venkateswaran-gv](https://www.linkedin.com/in/girish-venkateswaran-gv) • Portfolio/Example Works: <https://github.com/GV-98/Girish-Portfolio>

PROFESSIONAL SUMMARY

Finance professional bringing 3+ years of cumulative experience in equity research, portfolio management, & investment banking. An alumnus of top North-American business schools. Proficient in company/industry/sector analysis across geographies, data capture/manipulation, financial technology & coding software, modeling, DCF/DDM/multiples/SoTP valuation, & machine learning models. CFA Institute Level I candidate. Former national-level table tennis player in KSA, current powerlifter. Willing to pursue IFIC, CFP, CPA certifications.

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, K.S.A

- 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, U.S.A / Remote

- Took on an advisory role in creating 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, 4-person team setting led by a Managing Director
- Conducted client due diligence & advising, NDA & term-sheet distribution, and monthly firm-wide performance report creation
- Spearheaded CW's rapidly growing E.S.G initiative; On-boarded over 10 climate & energy-tech clients with proven growth potential
- Conducted client valuation using multiples and comparable analysis, DCF & DDM modeling, and collected data using PitchBook
- Shared responsibility for intern training & client-origination effort; utilized Salesforce & PitchBook to aid effort to reach new clientele

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

Jarir Investment | Riyadh, K.S.A / 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 Certificate), PitchBook, Salesforce, SQL, C++, R, MATLAB, SolidWorks, VBA, Tableau, CompXM & CapSim Simulation

Soft Skills: Detail-Oriented, Collaborator, Leader, Analytical, Intellectually Curious, Effective Communicator, Financial Acumen, 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