

Jose Estradas's CV

Finance and Economy focusing in Financial Analyst on Private Equity

Research interests

Private Equity, Investment Banking, Asset Management and Portfolio Management

Education

Bachelor of Science in Financial Economics

Brigham Young University–Idaho

Rexburg, ID | *September 2021 – December 2025*

- Minor in Data Science
- GPA: 3.4 / 4.0 | Major GPA: 3.5 / 4.0

KEY SKILLS AND CERTIFICATES

- Business Intelligence & Visualization: Power BI, Microsoft Excel, Tableau
- Participated in the CFA Institute Research Challenge, conducted the valuation, and equity research on a
- publicly traded company
- Financial Modeling and Forecasting Financial Statements Certificate
- Programming & Data Management: R, SQL (MySQL, Statistical & Data Analysis)
- Participant, Bloomberg Global Trading Challenge, collaborated as a team leader of five to supervise a virtual
- investment portfolio of \$1M in a global competitive environment
- Bloomberg Market Concepts Certificate

Experience

Teaching Assistant

Brigham Young University–Idaho, Department of Economics

Rexburg, ID | *August 2022 – Present*

- Reviewed weekly performance of 90+ students across multiple sections, implementing targeted teaching strategies.
- Coordinated a team of TAs in designing and executing feedback systems, significantly boosting teaching outcomes.

Finance Intern

The Church of Jesus Christ of Latter-day Saints

Salt Lake City, UT | *April 2024 – September 2024*

- Analyzed 25,000+ properties across the U.S. using Power BI to support data-driven decision-making.
- Corrected over 5,000 property record errors using advanced Excel data validation techniques to improve accuracy and reliability.

CPA Assistant

Contadores Fiscales Especializados, E.G

Chiapas, Mexico | *January 2020 – February 2021*

- Maintained financial records by processing 500+ journal entries with Conta Fiscal software.
- Organized and updated balance sheets, income statements, and accounting records to ensure audit readiness. “ “ ”

Projects

Financial Analysis Project

- Analyzed Weighted Average Cost of Capital (WACC) trends, identifying a 5.9% hurdle rate optimal for capital budgeting.
- Informed leadership on investment risk and return expectations to support strategic decision-making.
- Streamlined financial comparisons across top firms using Excel and Bloomberg to clarify market positioning and enhance financial strategy.

Investment Portfolio Analysis (Power BI)

- Developed an interactive Power BI dashboard analyzing 1,000+ ETFs, indexes, and mutual funds to identify optimal portfolio combinations.
- Extracted and integrated financial data from Morningstar and Yahoo Finance, including yield and risk metrics.
- Supported fund performance analysis and portfolio optimization through data-driven insights. “ “ ”