

**SCOTT S. CARVALHO**  
769 Dorchester Ave – Boston, MA 02125  
scottcarvalho71@gmail.com · Cell: (508)-686-6526

## WORK EXPERIENCE

---

**State Street Global Markets – State Street Associates – Boston, MA** November 2021 – February 2023  
Officer – Quantitative Researcher

- Collaborated with industry leaders and academics to co-author a white paper on integrating securities lending and ESG.
- Revamped the team's Python code infrastructure to enhance client reporting, indicator creation, and ad-hoc client requests.
- Enhanced flexibility by optimizing the internal market indicator API in Python for customized data requests.
- Presented twice at State Street's annual Research Retreat conference to current and prospectus clients (Remote & LIVE)

**State Street Global Markets – Boston, MA** July 2019 – November 2021

Senior Associate - Professional Development Rotational Program

Rotations: Securities Finance Algorithmic Trading Group, Quantitative Risk, Currency Management, State Street Associates

- Built a real-time market monitoring dashboard using Python (dash package), HTML, CSS, JavaScript, and SQL

## INTERNSHIPS

---

**Fidelity Investments – Boston, MA & Merrimack NH** May-Aug. 2017 – May-Aug.-2018

Intern – Family Office Services (2018) & Market Data Services (2019)

- Assisted RMs with Single-Family Lifecycle timeline to help predict client needs in conjunction with office events
- Worked with Client Experience reporting software to reduce miscalls for over 300 clients
- Provide data analysis and reporting for Portfolio Communications, Data Strategy, and Portfolio Analyst teams
- Lead an independent project to automate market data reporting and searching using Splunk software

## COLLEGE EXPERIENCE

---

**Bentley Investment Group – Waltham, MA** Fall 2016 – Fall 2018

*Energy Sector Analyst*

- Student-run organization responsible for managing approximately \$1MM of the university's endowment.
- Utilize Bloomberg Terminal and FactSet to review SEC filings, earnings releases, investor presentations, and research reports. Develop, and present stock pitches to 100+ member club and executive board

**Service-Learning Special Project – Waltham, MA** Fall 2016 – Spring 2018

*Project Assistant*

- Designed and created a functional user interface for Bentley's Service-Learning and Civic Engagement Office to track 1,000+ students/year and 60+ community partners
- Collaborated with professors and university office staff to gather requirements, prioritize functions, and track progress

**Activities:** Varsity Men's Lacrosse, Club Hockey Team, Trading Society-CIO, Campus Ambassador, Parmenter Food Pantry

## EDUCATION

---

**Bentley University, Waltham, MA** Class of 2019

BS, Finance, Computer Information Systems (Minor)

cum laude (GPA: 3.55)

**Vienna University of Economics and Business, Vienna, Austria**

Exchange Student – Entrepreneurial studies - Fall 2017

## TECHNOLOGY SKILLS & CERTIFICATIONS

---

Technology Skills: Python, SQL, Git, GitHub, Splunk, Bloomberg Terminal

Certifications: Bloomberg Market Concepts

## PUBLISHED WORKS

---

Whitmore, T., Carvalho, S., Wang S., (2021). Integrating ESG Considerations into Securities Lending. *The Risk Management Association*