

SCOTT S. CARVALHO

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WORK EXPERIENCE

State Street Global Markets – State Street Associates – Boston, MA November 2021 – Present
Officer – Quantitative Researcher

- Co-authored a white paper with industry leaders and academics on the integration of securities lending and ESG
- Remodeled team's Python code infrastructure integral in client reporting, indicator creation, and ad-hoc client requests
- Optimize internal market indicator API in Python for greater flexibility in customizing data requests

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
- Presented AI chatbot idea to Fidelity executive staff - finalist for product development
- 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, Excel VBA, SQL, Splunk, Qlik, Bloomberg Terminal, Factset
Certifications: Bloomberg Market Concepts

PUBLISHED WORKS

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