

## Dipekshya Karki

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### EDUCATION

SUNY Plattsburgh - Plattsburgh, NY  
*Bachelor of Science, Finance (AACSB Accredited)*  
*Bachelor of Science, Computer Science*

Expected graduation: December 2026  
Major GPA – 3.59/4.0

### CORE COMPETENCIES

**Portfolio Management | Equity Research & Analysis | Asset Allocation | Risk Management | Performance Attribution | Securities Valuation | Investment Strategy | Quantitative Analysis | Bloomberg Terminal | Financial Modeling | Python | SQL | Tableau | Excel (Advanced) | DCF Valuation | Fundamental Analysis | Technical Analysis | Sector Rotation**

### EXPERIENCES

#### Finance Intern | Himalayan Trails Adventure Travel and Tours Kathmandu, Nepal | Jun – Aug 2025

- Developed comprehensive financial models and 3-year revenue projections incorporating scenario analysis that informed \$500K+ capital allocation strategy.
- Built executive dashboard monitoring 12+ performance metrics including revenue growth, margins, and cash flow to support strategic investment decisions.
- Conducted profitability analysis on \$2M+ revenue base, identifying cost optimization opportunities and pricing strategies that improved margins by 15-18%

#### SUNY Plattsburgh Investment Club | Vice President Sep 2023 – May 2024

- Managed \$50K diversified equity portfolio across 8+ positions using fundamental analysis, DCF models, and relative valuation techniques.
- Led investment committee with 15+ members to evaluate investment theses, conduct risk-return analysis, and execute portfolio rebalancing decisions.
- Conducted comprehensive equity research and published sector reports on Energy and Technology industries, analyzing competitive positioning, market trends, and valuation metrics.
- Generated 12% portfolio return over 8-month period through disciplined security selection and active sector allocation

#### Resident Assistant | SUNY PLATTSBURGH Aug 2023 – Present

- Manage \$2,500+ annual budget allocation across 20+ programs with full P&L accountability; promoted to building leadership role.
- Applied data-driven decision making to optimize resource deployment, increasing program participation by 30%.

### PROJECTS

#### SaaS M&A Valuation Model – Zenith Acquisition Analysis | Personal Project

- Performed comprehensive valuation of mid-market SaaS company using DCF, trading comparables, and precedent transactions yielding enterprise value range of \$0.8B–\$5.3B.
- Built 5-year financial projection model with revenue growth deceleration (12% to 8%) and margin expansion (18% to 24% EBITDA), calculating intrinsic value of \$3.45B.
- Analyzed strategic alternatives and recommended strategic sale at \$5.0B–\$5.5B based on synergy potential and comparable transaction analysis.
- GitHub:** <https://github.com/dipekshyak/zenithcasestudy>

#### Quantitative Equity Strategy with Machine Learning (Python, Streamlit)

- Developed systematic trading strategy for mega-cap technology portfolio with ML-based return predictions using 750+ data points to forecast next-day price movements.
- Backtested moving average crossover strategy generating 39.5% CAGR versus 21.5% buy-and-hold benchmark, calculating Sharpe ratio and maximum drawdown for risk assessment.
- Created interactive dashboard with live market data, portfolio analytics, and automated Excel reporting capabilities.
- Live demo: <https://finance-dashboard-lxhwhaw5i8npib49ppblzr.streamlit.app/>

### LEADERSHIP & ACTIVITIES

#### Vice President | Nepalese Association of Plattsburgh Jan 2023 – May 2024

- Led organization of 50+ members; coordinated cultural events and fundraising initiatives that raised \$3K+ for community outreach programs.

#### Student Senator | Student Association March - Dec 2023

- Reviewed budget proposals and allocated \$100K+ in student organization funding; collaborated with administration on policy initiatives.

### SKILLS & CERTIFICATIONS

Investment Analysis: Equity Research, DCF Valuation, LBO/M&A Modeling, Comparable Company Analysis, Precedent Transactions, 3-Statement Financial Modeling, Scenario & Sensitivity Analysis, Portfolio Construction, Risk-Return Optimization

Technical Platforms: Bloomberg Terminal (BMC & BFF Certified), Excel (VBA, Macros, Power Query, Pivot Tables), Python (Pandas, NumPy, Matplotlib, Financial Libraries), SQL, Tableau, Power BI

Certifications: Bloomberg Market Concepts (BMC), Bloomberg Finance Fundamentals (BFF), Microsoft Excel Yellow Belt, Oracle Certified Foundations Associate