Erik Chan

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Education

University of California – Riverside — Jun, 2022
B.A. Business Economics: Finance — Business GPA: 3.9

Experience

Founder Legacy Partners
Private Equity Analyst — Dec, 2020 - Sep, 2021

- Presented decision on buyout to executives by constructing investment thesis, market research, and product research on a total of 24 mid-sized (20M - 100M enterprise value) SaaS and tech companies
- Automated 3 hours/day of data retrieval responsibilities for the entire company by developing python scripts (Pandas, NumPy) that scraped financial documents into csv files
- Advised company executives using identified industry trends, such as market growth, total addressable market, market concentration/ competition, with STATA and comparable companies
- Presented investment standpoint on 20+ companies in the tech industry to company executives by constructing discounted cash flow and comparable models utilizing private company financial statements
- Directly contacted CEO's and Principals of targeted companies for an investment partnership

Exodus Investments, LLC — Nov, 2021 – Apr, 2022
Founder

- Manage allocated capital within investment holding company using stochastic models to generate 130% return ($100k gross profit) within two operating months
- Conduct market health research and valuations to tweak portfolio weighting
- Utilize market indicators combined with financials to trade option spreads

Project Experience

Business Modeling
LinkedIn and Nike Financial Forecast Project

- Valued Nike using DCF analysis; found that stock was undervalued by 4% due to economic uncertainty with COVID-19 and retail sales; invested personal capital to return 8.6% profit
- Utilized Free Cash Flow to Firm and Equity to return stock value and determine potential of market

Quant Analysis

- Used Monte Carlo Simulations alongside the Black Scholes Model to perform quantitative analysis on Tesla and the S&P 500 and measure market expected risk on respective publicly traded companies
- Construct a market hedged portfolio using put-call parities to quantify discrepancies between artificial security and the real security

Programming Projects: https://www.github.com/erikchan1000

Skills

Advanced: Excel, DCF Model, Market and Industry Research, Business Modelling, Statistical Analysis

Intermediate: C++, mySQL Databases, Python, HTML, Sales/Marketing