

# Grant Li

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## WORK EXPERIENCE

### Guggenheim Partners Investment Management

New York, NY

*Credit Research Analyst – Business Services, Insurance Brokers, Consumer Products*

Aug 2018 – Present

- \$80bn+ AUM of investments across the full capital structure that manages assets primarily for insurance companies and pension funds; high yield and investment grade
- Conducted due diligence on new investment opportunities; created research decks and presented credit thesis and recommendations to investment committee
- Monitoring responsibilities for 70+ companies, including investments in the business services, insurance brokerage, food & beverage, restaurant and consumer products space; personally responsible for ~\$2.0bn of AUM
- Successfully deployed \$300mm+ of capital in bonds, loans and preferred equity; recommended investments have all performed vs expectations
- Primary research analyst on business services and insurance brokers; responsible for developing internal views on new sub-sectors and creating guidelines for evaluating relative value

### Wells Fargo & Co. – Principal Investments

San Francisco, CA

*Buy-Side Credit Analyst – Tech, Media, and Telecom Group*

Jun 2016 – Jul 2018

- \$10bn+ portfolio composed of investments across a variety of fixed-income instruments (bonds and loans); investment policy that emphasizes spread and relative value
- Conducted due diligence and maintained operating models for 15+ companies across the tech and media sectors in support of investments in high yield bonds and loans
- Created operating and valuation models with the goal of evaluating risk profiles of low-grade companies for fixed income investments
- Recommended and successfully garnered a \$24 million investment in the senior unsecured notes of an enterprise software company
- Prepared quarterly and annual reports that analyzed the operating performance and credit quality of existing investments; performed extensive due diligence and market research to assign and assess internal risk ratings

## EDUCATION

### University of Southern California

Los Angeles, CA

*Bachelor of Science in Business Administration / Mathematical Finance Minor*

Graduation: May 2016

- **Cumulative GPA:** 3.71 ; **GMAT:** 740 ; **SAT:** 2300
- **Honors:** Dean's List (All Semesters), Presidential Scholarship Recipient, ALD National Honor Society, National Merit Scholarship Competition Finalist
- **Relevant Coursework:** Valuation, Corporate Finance, Private Equity/Venture Capital, Accounting, Advanced Calculus

## LEADERSHIP

### National Men's Table Tennis Team

USA

*Competing Member*

2010 – 2015

- Participated in the World Championships, World Cup, and World Junior Championships
- Competed internationally representing the United States on a team consisting of 3-4 athletes
- Balanced an intensive 20+ hours/week training and tournament schedule with a priority on academic achievement

## SKILLS, ACTIVITIES & INTERESTS

**Languages:** Fluent in Mandarin Chinese; Conversational Proficiency in Spanish

**Technical Skills:** Bloomberg Terminal, Excel Modeling, Microsoft Office Suite

**Interests:** Boston Sports, Flag Football, Basketball, Psychology, Travel