Charles Castillo
Application for Research Associate

Contact Information

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Objective

Dedicated Research Associate with strong analytical skills and passion for financial markets. Seeking to leverage quantitative research experience and deep understanding of equity markets to contribute to investment decision-making processes.

Education

◊ MASTER OF BUSINESS ADMINISTRATION
Harvard Business School, Cambridge, MA
2023 - 2025 (Expected)
Concentration: Finance & Investment Management
GPA: 3.9/4.0

◊ BACHELOR OF SCIENCE IN MATHEMATICS
Massachusetts Institute of Technology, Cambridge, MA
2019 - 2023
Minor: Computer Science
GPA: 3.8/4.0, Phi Beta Kappa

Relevant Coursework:

- Stochastic Processes
- Computational Finance
- Statistical Learning
- Linear Algebra

Professional Experience

► RESEARCH ASSOCIATE
Fidelity Investments, Boston, MA
January 2024 - Present

- Conduct comprehensive equity research across technology and consumer discretionary sectors
- Build sophisticated financial models for valuation analysis covering 30+ public companies
- Prepare detailed research reports and investment recommendations for portfolio managers
- Analyze market trends and identify emerging investment themes
- Support senior analysts in client presentation preparation

Key Accomplishments:
✓ Identified undervalued tech stock that generated 25% return
✓ Developed proprietary ESG scoring model for portfolio screening
✓ Published 15+ research notes with 90% accuracy in recommendations

► QUANTITATIVE RESEARCH INTERN
State Street Global Advisors, Boston, MA
June 2023 - December 2023

- Developed alternative data models for factor investing strategies
- Performed backtesting and performance attribution analysis
- Collaborated with portfolio management team on asset allocation
- Researched applications of machine learning in investment process
- Created automated reporting tools using Python and SQL

► RESEARCH ASSISTANT
MIT Laboratory for Financial Engineering
September 2021 - May 2023

- Assisted professors in academic research on market microstructure
- Analyzed high-frequency trading data and market impact studies
- Co-authored research paper on "Algorithmic Trading and Market Efficiency" published in Journal of Financial Markets
- Presented findings at MIT Finance Conference (2023)

Technical Skills

Programming Languages:
✓ Python (Advanced) - NumPy, Pandas, Scikit-learn
✓ R (Advanced) - Statistical modeling, data visualization
✓ SQL (Intermediate) - Database querying and management
✓ MATLAB (Intermediate) - Financial modeling

Financial Software:
✓ Bloomberg Terminal (Advanced)
✓ FactSet (Intermediate)
✓ Refinitiv Eikon (Intermediate)
✓ Morningstar Direct (Basic)

Analytical Tools:
✓ Excel/VBA (Advanced)
✓ Tableau (Intermediate)
✓ SPSS (Intermediate)

Certifications & Awards

✧ CFA Level II Candidate (June 2025)
✧ Series 7 & 63 Registered
✧ Python for Finance Certification - Wharton Online
✧ Outstanding Research Award - MIT (2023)
✧ Harvard Business School Merit Scholarship Recipient

Publications & Projects

◦ "Algorithmic Trading and Market Efficiency" - Journal of Financial Markets (2023)
◦ "ESG Integration in Quantitative Investment Strategies" - Harvard Business Review (Under Review)
◦ Personal Project: Cryptocurrency Price Prediction Model using Machine Learning (GitHub: 500+ stars)

Additional Information

Languages: English (Native), Spanish (Fluent), Portuguese (Basic)
Interests: Machine Learning, Behavioral Finance, Basketball
Volunteering: Financial Literacy Coach - Boys & Girls Club of Boston