#### **Jeffrey Davis**

Applied Position: Investment Analyst

CONTACT

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### **EDUCATION**

Master of Science in Finance

Stanford Graduate School of Business • 2022-2024

- GPA: 3.85/4.0
- Concentration: Investment Management & Corporate Finance
- Dean's List: All 4 quarters
- Thesis: "Impact of AI on Technology Sector Valuations"
- 🃜 Bachelor of Arts in Economics

University of California, Berkeley • 2018-2022

- GPA: 3.7/4.0, Magna Cum Laude
- Double Major: Economics & Statistics
- · Honors: Phi Beta Kappa, Golden Key International Honour Society

# PROFESSIONAL EXPERIENCE

- INVESTMENT ANALYST | Wells Fargo Securities September 2024 Present | San Francisco, CA
- Research and analyze 20+ technology companies with market cap >\$1B
- Develop comprehensive financial models using DCF, P/E multiples, and sum-ofparts analysis
- Publish weekly sector notes and quarterly earnings previews for institutional clients
- Collaborate with sales team to support \$500M+ in technology sector investments
- Maintain "Buy" rating accuracy of 78% over 12-month period
- **©** Key Achievement: Identified early-stage AI company that delivered 40% returns in 6 months
- EQUITY RESEARCH ASSOCIATE | Morgan Stanley June 2024 August 2024 | Menlo Park, CA
- Supported senior analysts covering software and semiconductor industries
- Built complex financial models for IPO valuations and M&A analysis
- Conducted primary research through expert networks and industry surveys
- Prepared materials for institutional investor meetings and conferences
- Assisted in due diligence for \$2.8B technology acquisition
- SUMMER ANALYST | Blackstone Private Equity June 2023 - August 2023 | San Francisco, CA
- · Evaluated investment opportunities in growth-stage technology companies
- · Performed market sizing analysis and competitive landscape research
- Assisted in portfolio company monitoring and value creation initiatives
- · Created executive presentations for investment committee meetings



| ★★★★★ Bloomberg Terminal ★★★★☆ FactSet ★★★☆☆ S&P Capital IQ | | ★★★★★ Excel/VBA ★★★★☆ Python ★★★☆☆ R Programming | | ★★★★★ PowerPoint ★★★★☆ SQL ★★★☆☆ Tableau |

**SOFTWARE** 

#### ANALYTICAL CAPABILITIES

- Financial Modeling & Valuation
   Industry & Competitive Analysis
- Risk Assessment & Management
   ESG Integration & Analysis
- Statistical Analysis & Forecasting Portfolio Construction & Optimization

### **?** CERTIFICATIONS & ACHIEVEMENTS

- 辈 CFA Level III Candidate (February 2025)
- 辈 Series 7 & 63 Registered Representative
- 👺 Bloomberg Market Concepts (BMC) Certified
- Stanford Finance Excellence Award (2024)
- UC Berkeley Economics Department Honors (2022)

#### **III** NOTABLE PROJECTS

- 🔬 "Machine Learning Applications in Equity Valuation" Independent Research
- Developed ML models to predict earnings surprises with 68% accuracy
- Presented findings at Stanford Finance Student Conference
- 🔬 Technology Sector Deep Dive Morgan Stanley Internship Project
- Comprehensive analysis of cloud computing market trends
- Identified key investment themes for next 3-5 years

## **ADDITIONAL INFORMATION**

- 🗣 Languages: English (Native), Spanish (Professional), Mandarin (Conversational)
- @ Interests: Fintech Innovation, Sustainable Investing, Data Science, Hiking
- 🤝 Volunteer: STEM Mentor at San Francisco Boys & Girls Club