MICHAEL DIAZ

Applied Position: INVESTMENT

ANALYST

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### **©** EXECUTIVE SUMMARY

Results-driven Investment Analyst with 3+ years of experience in energy sector research and ESG-focused investment strategies. Demonstrated expertise in renewable energy markets, oil & gas fundamentals, and quantitative portfolio optimization. Strong track record of identifying value opportunities in volatile commodity markets.

#### **\*** ACADEMIC CREDENTIALS

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MBA in Finance & Strategy
Rice University - Jones Graduate School of Business
2022 - 2024 | Houston, TX
• GPA: 3.85/4.0 | Beta Gamma Sigma Honor Society
• Concentration: Energy Finance & Sustainable Investing
• Capstone: "Valuation Models for Renewable Energy
  Infrastructure Projects"
• Energy Finance Case Competition - 1st Place (2023)
Bachelor of Science in Petroleum Engineering
University of Texas at Austin
2018 - 2022 | Austin, TX
• GPA: 3.7/4.0 | Magna Cum Laude
• Minor: Business Administration
• Senior Design Project: "Optimization of Enhanced Oil
 Recovery Techniques using Machine Learning"
• Dean's List: 6 semesters
• Society of Petroleum Engineers - Student Chapter VP
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#### **PROFESSIONAL EXPERIENCE**

- SENIOR INVESTMENT ANALYST | Energy Sector

  Vanguard Group | September 2024 Present | Austin, TX
- Research and analyze 18+ energy companies across oil & gas, renewables, and utilities sectors with combined market cap of \$400B+
- Develop comprehensive financial models incorporating commodity price

forecasts, ESG metrics, and regulatory impact analysis

- Manage \$120M energy sector allocation within institutional portfolio
- Lead quarterly earnings analysis and provide investment recommendations

to portfolio management committee

- Created proprietary carbon intensity scoring model for oil & gas companies
- Key Achievement: Recommended early position in renewable energy ETF

that outperformed benchmark by 22% over 8-month period

- INVESTMENT ANALYST | Energy & Infrastructure

  BlackRock | June 2024 August 2024 | Houston, TX
- Supported senior analysts covering North American energy infrastructure
- Built detailed financial models for midstream pipeline companies
- Conducted fundamental analysis of renewable energy developers
- Prepared investment committee presentations for \$2.8B infrastructure fund
- Analyzed regulatory environment impact on energy transition investments

Notable Project: Comprehensive analysis of Texas renewable energy

infrastructure investment opportunities

- PETROLEUM ENGINEER | Financial Analysis

  ExxonMobil | August 2022 May 2024 | Houston, TX
- Performed economic evaluation of upstream development projects
- Built financial models for \$500M+ capital allocation decisions
- Analyzed commodity price sensitivities and project risk assessments
- Collaborated with finance teams on budget planning and forecasting
- Led technical due diligence for potential acquisition targets

Bridge to Finance: Gained deep understanding of energy industry

fundamentals while developing financial modeling expertise

\*\*TECHNICAL COMPETENCIES



# PROFESSIONAL CERTIFICATIONS & ACHIEVEMENTS

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| ☐ CFA Charterholder (2024)
| ☐ Series 7 & 63 Registered Representative
| ☐ Energy Risk Professional (ERP) Certification
| ☐ Bloomberg Market Concepts (BMC) Certified
| ☐ Professional Engineer (PE) License - Texas
| ☐ Rice University Outstanding MBA Graduate (2024)
| ☐ Vanguard Excellence in Analysis Award (Q3 2024)
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## NOTABLE PROJECTS & RESEARCH

- "Carbon Footprint Valuation Framework for Energy Companies"
- Developed proprietary ESG scoring methodology adopted by Vanguard
- Integrated Scope 1, 2, and 3 emissions data into investment models
  - Framework applied to \$2.1B in energy sector investments

- Comprehensive study of wind and solar development opportunities
  - Identified \$800M in potential infrastructure investments
- Presented findings to BlackRock Infrastructure Investment Committee
- - Machine learning application for reservoir management
  - Published in SPE Journal of Petroleum Technology (2022)
  - Cited 25+ times in industry and academic publications

ADDITIONAL INFORMATION

- Languages: English (Native), Spanish (Professional Working Proficiency)
- Professional Interests:

Energy Transition • Sustainable Finance • Quantitative Analysis

ESG Investing • Alternative Energy Technologies

- Personal Interests:
  - Rock Climbing Renewable Energy Systems Data Visualization
    Texas BBQ Endurance Running
- ♥ Community Engagement:
  - Mentor UT Austin Engineering Career Services
  - Board Member Austin Clean Energy Initiative
  - Volunteer Habitat for Humanity (Solar Panel Installation)
  - Guest Lecturer Rice University Energy Finance Course