





LISA DAVIS

Applied Position: Financial Risk Analyst

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## CAREER OBJECTIVE

Analytical and detail-oriented Financial Risk Analyst with expertise in healthcare and biotechnology sectors. Passionate about translating complex scientific and financial data into actionable investment insights. Seeking to leverage strong research background and quantitative skills in a dynamic investment research environment.

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## ACADEMIC BACKGROUND

### UNIVERSITY OF PENNSYLVANIA - WHARTON SCHOOL

Master of Science in Finance | 2023-2024

- GPA: 3.9/4.0 |
  - Concentration: Investment Management & Security Analysis |
  - Relevant Coursework: Equity Valuation, Fixed Income Analysis, |
  - Behavioral Finance, Quantitative Portfolio Management |
  - Capstone Project: "Biotech Valuation Models in the Post-COVID Era" |
  - Teaching Assistant: Corporate Finance (Fall 2023) |
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### BRYN MAWR COLLEGE

Bachelor of Arts in Economics & Mathematics | 2019-2023

- GPA: 3.8/4.0, Summa Cum Laude |
  - Double Major: Economics & Applied Mathematics |
  - Honors: Phi Beta Kappa, Magna Cum Laude |
  - Senior Thesis: "Machine Learning Applications in Stock Selection" |
  - Economics Department Research Award (2023) |
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## PROFESSIONAL EXPERIENCE

### Financial Risk Analyst

Janney Montgomery Scott LLC • September 2024 - Present

Research Coverage: Healthcare & Biotechnology (15+ companies)

#### Primary Responsibilities:

- Conduct fundamental analysis of pharmaceutical and biotech companies
- Build complex financial models incorporating drug pipeline valuations
- Monitor FDA approvals, clinical trial data, and regulatory developments
- Prepare detailed research reports and investment recommendations
- Support senior analysts in earnings call preparation and client meetings

#### Key Achievements:

- Identified undervalued small-cap biotech that gained 45% in 4 months
- Developed proprietary risk-adjusted NPV model for drug development
- Published 12+ research notes with 85% accuracy in price targets
- Maintained "Outperform" rating accuracy of 71% over 8-month period

### EQUITY RESEARCH INTERN

Cowen & Company • June 2024 - August 2024

- Assisted healthcare research team with biotech sector coverage
- Analyzed competitive landscapes for emerging therapeutic areas
- Built financial models for early-stage drug development companies
- Attended medical conferences and investor presentations
- Created industry primers on gene therapy and cell therapy markets

Notable Project: Comprehensive analysis of CAR-T therapy market dynamics, which influenced firm's investment thesis on 3 portfolio companies

### RESEARCH ASSISTANT

Wharton Finance Department • September 2023 - May 2024

- Assisted Professor Sarah Chen in behavioral finance research
- Analyzed large datasets using Python and R statistical software
- Co-authored working paper on "Investor Sentiment in Biotech Markets"
- Presented research findings at Wharton PhD Finance Conference
- Managed database of 10,000+ institutional investor transactions

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## TECHNICAL SKILLS & COMPETENCIES

	PROGRAMMING	&	ANALYTICS
	Python <div><div></div></div>	95%	R
	<div><div></div></div> 80%		
	SQL <div><div></div></div>	75%	MATLAB
	<div><div></div></div> 50%		
	VBA/Excel <div><div></div></div>	95%	Stata
	<div><div></div></div> 60%		


	FINANCIAL	SOFTWARE
	Bloomberg Terminal <div><div></div></div>	95%
	FactSet <div><div></div></div>	75%
	S&P Capital IQ <div><div></div></div>	60%
	Refinitiv Eikon <div><div></div></div>	50%
	PitchBook <div><div></div></div>	55%

	SPECIALIZED	KNOWLEDGE
	• FDA Regulatory Processes & Drug Approval Pathways	
	• Clinical Trial Design & Statistical Analysis	
	• Pharmaceutical Market Access & Pricing Strategies	
	• Biotechnology Valuation Models (rNPV, Peak Sales Forecasting)	
	• Healthcare Economics & Reimbursement Landscape	

## 🏆 CERTIFICATIONS & PROFESSIONAL DEVELOPMENT

- 🏆 CFA Level I Passed (Level II candidate - May 2025)
- 🏆 Series 7 & 63 Registered Representative
- 🏆 Bloomberg Market Concepts (BMC) Certification
- 🏆 CBI Biotech Primer Certificate Program
- 🏆 Wharton Executive Education: Healthcare Management


## 📚 RESEARCH & PUBLICATIONS

 "Investor Sentiment and Biotech Stock Performance"

Co-author with Dr. Sarah Chen | Under Review - Journal of Behavioral Finance

 "Valuation Challenges in Gene Therapy Development"

Wharton Finance Working Paper Series (2024)

 "Machine Learning in Healthcare Investment Decision-Making"

Bryn Mawr College Economics Department (2023) - Thesis Award Winner


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## HONORS & AWARDS

 Wharton School Merit Scholarship Recipient (2023-2024)

 Bryn Mawr College Economics Department Research Award (2023)


 Beta Gamma Sigma Business Honor Society


 Golden Key International Honour Society


 Dean's List: All 8 semesters (Bryn Mawr)


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## ADDITIONAL INFORMATION

 Languages: English (Native), French (Fluent), German (Intermediate)

 Professional Interests: Precision Medicine, Digital Health, ESG in Healthcare, Women in Finance Initiatives

 Personal Interests: Medical Volunteering, Classical Piano, Rock Climbing, Science Communication

 Volunteer Experience:

- Financial Literacy Mentor - Philadelphia Public Schools
- Research Volunteer - Children's Hospital of Philadelphia
- Board Member - Bryn Mawr College Alumni Association (Philadelphia Chapter)