



# Nancy Robinson


**Applied Position: Investment Analyst**

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## Contact Details

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## PROFESSIONAL SUMMARY

Accomplished Investment Analyst with 7+ years of experience in equity research, financial modeling, and portfolio management. Proven expertise in identifying undervalued securities and developing comprehensive investment recommendations. Strong background in ESG analysis and sustainable investing strategies.

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## EDUCATION

### MASTER OF SCIENCE IN FINANCE

MIT Sloan School of Management | Cambridge, MA | 2018-2020

- **GPA:** 3.9/4.0

- **Thesis:** "ESG Integration in Quantitative Investment Models"

- **Honors:** Dean's List, Sloan Finance Society President

- **Relevant Coursework:** Advanced Financial Theory, Behavioral Finance, Alternative Investments

## BACHELOR OF ARTS IN ECONOMICS

Harvard University | Cambridge, MA | 2014-2018

- **GPA:** 3.85/4.0, Magna Cum Laude
  - **Concentration:** Economics with minor in Mathematics
  - **Honors:** Phi Beta Kappa, Harvard Economics Society Vice President
  - **Study Abroad:** London School of Economics (Fall 2016)
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## PROFESSIONAL EXPERIENCE

### SENIOR INVESTMENT ANALYST

Fidelity Investments | Boston, MA | **January 2023 - Present**

**Portfolio Coverage:** Technology, Healthcare, and Consumer Discretionary sectors (\$2.8B AUM)

#### Key Responsibilities:

- Conduct fundamental analysis on 40+ public companies across assigned sectors
- Develop detailed financial models and valuation frameworks using DCF, multiples, and sum-of-parts methodologies
- Generate investment recommendations resulting in 15% average annual outperformance vs. benchmarks
- Present research findings to investment committee and institutional clients
- Mentor 3 junior analysts and coordinate sector research initiatives

#### Notable Achievements:

- 🎯 Identified 12 winning stock picks with average return of 28%
- 🎯 Published 45 research reports with 92% accuracy rate on price targets
- 🎯 Led ESG integration project, improving fund's sustainability score by 35%
- 🎯 Fidelity "Analyst of the Year" Award (2024)

### INVESTMENT ANALYST

Wellington Management | Boston, MA | **June 2020 - December 2022**

**Portfolio Focus:** Mid-cap growth equities and emerging markets

- Analyzed 60+ companies in technology and healthcare sectors
- Built comprehensive financial models and maintained real-time sector

dashboards

- Collaborated with portfolio managers on position sizing and risk management
- Conducted due diligence on potential investments including management meetings
- Achieved 18% annual alpha generation across covered names

### **Key Accomplishments:**

- ✦ Recommended top-performing stock that generated 45% return in 8 months
- ✦ Developed proprietary screening methodology adopted firm-wide
- ✦ Led successful IPO analysis resulting in \$50M initial position

## **EQUITY RESEARCH ASSOCIATE**

BlackRock | New York, NY | **July 2018 - May 2020**

- Supported senior analysts covering large-cap US equities (\$5B+ market cap)
  - Maintained financial models for 25 companies in industrials and materials sectors
  - Prepared earnings preview and review reports for institutional clients
  - Conducted competitive analysis and industry trend research
  - Participated in quarterly earnings calls and investor conferences
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## **TECHNICAL EXPERTISE**

### **Financial Analysis & Modeling**

- Advanced Excel/VBA (Expert level)
- Financial modeling (DCF, LBO, M&A)
- Valuation methodologies
- Scenario and sensitivity analysis
- Monte Carlo simulations

### **Software & Platforms**

- **Data & Analytics:** Bloomberg Terminal, FactSet, Refinitiv, S&P Capital IQ
- **Programming:** Python, R, SQL, MATLAB

- **Visualization:** Tableau, Power BI, Advanced Excel charting
- **Database Management:** PostgreSQL, MySQL

## Research & Documentation

- Industry and competitive analysis
  - ESG research and scoring
  - Technical writing and presentation skills
  - Due diligence processes
  - Regulatory filing analysis (10-K, 10-Q, 8-K)
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## PROFESSIONAL CERTIFICATIONS

- 🏆 **CFA Charterholder** - CFA Institute (2021)
  - 🏆 **CAIA Designation** - Chartered Alternative Investment Analyst (2022)
  - 🏆 **Series 7** - General Securities Representative License (2018)
  - 🏆 **Series 63** - Uniform Securities Agent State Law Examination (2018)
  - 🏆 **Bloomberg Market Concepts** - Bloomberg Institute (2019)
  - 🏆 **Sustainable Finance Certificate** - CFA Institute (2023)
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## AWARDS & RECOGNITION

- **Fidelity Analyst of the Year** (2024)
  - **Wellington Management Excellence Award** (2021, 2022)
  - **CFA Institute Research Challenge** - Regional Winner (2019)
  - **MIT Sloan Case Competition** - 1st Place Finance Track (2019)
  - **Harvard Economics Department Prize** - Outstanding Thesis (2018)
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## PUBLICATIONS & SPEAKING

### Research Publications:

- "ESG Integration in Quantitative Models" - Journal of Sustainable Finance (2023)
- "Technology Sector Outlook: AI Revolution" - Investment Management Review (2024)
- "Emerging Markets Healthcare: Growth Opportunities" - Global Equity Research (2022)

### Conference Presentations:

- CFA Institute Annual Conference 2024: "Future of ESG Analytics"
  - Boston Security Analysts Society 2023: "Mid-Cap Growth Investing"
  - MIT Investment Conference 2022: "Quantitative ESG Strategies"
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## ADDITIONAL QUALIFICATIONS

**Languages:** English (Native), Mandarin (Proficient), Spanish (Conversational)

### Professional Memberships:

- CFA Institute
- Chartered Alternative Investment Analyst Association (CAIA)
- Boston Security Analysts Society (BSAS)
- CFA Society Boston
- Women in Investment Management Network

### Volunteer Activities:

- **Financial Literacy Instructor** - Boys & Girls Club of Boston (2020-Present)
- **Mentor** - Harvard Women in Business (2019-Present)
- **Board Member** - Young Professionals in Finance Boston Chapter (2021-Present)

**Personal Interests:** Marathon running (Boston Marathon qualifier), classical piano, sustainable investing research, travel photography

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Portfolio of investment recommendations and detailed work samples available upon request