Julian Broche

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Email • LinkedIn • Github

First-generation graduate that transitioned successfully from pursuing a career in Aviation to landing a job on Wall Street. A passionate lifelong learner that wields a breadth of knowledge, spanning across traditional Finance, Artificial Intelligence and Web3. My innate curiosity and intuition powers an ability to connect the dots to discover inefficiencies within data and processes. I seek to add value to an organization as a Financial/Data Analyst by bridging the gap between technical and non-technical internal/external stakeholders utilizing fundamental and quantitative data.

Skills

Spoken Languages | English, Spanish, Portuguese

Languages/Environments | Python, SQL, Excel, Word, PowerPoint, Factset, SNL Financial, Bloomberg Terminal

Packages | Pandas, NumPy, BeautifulSoup

Data Visualization | Seaborn, Plotly, Tableau

Modeling | Financial, Statistical, Regression, Classification, Time Series Analysis, Neural Networks, Image Classification

Licenses | Series 7, Series 63, Series 86, Series 87, FAA Private Pilot, FAA Remote Pilot

WORK EXPERIENCE

Truist Securities   **Atlanta, GA**
FinTech and Information Services, Senior Equity Research Associate   *April 2021 – Present*

- Conducts quantitative analysis to forecast revenue and performs analytics to determine valuation and long-term stock price trajectory
- Builds complex three statement financial models that allow flexibility to perform sensitivity analysis
- Interfaces with internal/external company management to conduct extensive due diligence for initiations and deep dive analytical reports
- Automates mission critical spreadsheets which unlocked efficiencies for the team and reduced budgeted project hours by +25%

3Lambda LLC   **Atlanta, GA**
Digital Asset Focused Quant Fund, Co-Founder   *May 2019 – April 2021*

- Built a differentiated institutional quality pitch deck and led capital raising, which resulted in commits of ~$2 million dollars
- Developed backend Profit and Loss reporting systems

RBC Capital Markets   **San Francisco, CA**
Specialty Finance, Equity Research Associate   *July 2017 – May 2019*

- Tracked consumer credit data such as card charge-offs, 30/90+ day delinquencies, NPL balances in addition to commercial aircraft values to produce data-driven value added monthly and quarterly notes
- Helped coordinate dinners and generate talking points for fireside chats at the annual aircraft leasing conference
- Published numerous in-depth research reports and built income statement, balance sheet and cashflow financial models

New York, NY
Interest Rates Trading Analyst   *July 2016 – July 2017*

- Executed trades in excess of $500 million with extreme attention to detail for the head trader, solved trade breaks and calculated daily carry for the U.S Treasuries desk. In addition, monetized internal Investment Grade flow to maximize profit across the FICC platform

New York, NY
Equity Derivatives Analyst   *May 2015 – August 2015*

- Optimized research of disparate sources to compile a newsletter and weekly global economic calendar, which provided relevant information in a central location every morning for the sales team, while supporting traders with a range of ad hoc projects that included volatility, stochastic screening and event based back-tests

LEADERSHIP & PROFESSIONAL DEVELOPMENT

KSU Student Managed Investment Fund LLC   **Kennesaw, GA**
Chief Executive Officer   *January 2014 – March 2016*

- Led a team of 6 analysts and executed a macro equity strategy, that resulted in 8 investments averaging 26.48% ROI during tenure

Quinnipiac G.A.M.E. Forum Portfolio Competition   **New York, NY**
Participant   *March 2015*
- Placed 1st out of 41 schools in the growth category

EDUCATION

Kennesaw State University   **Kennesaw, GA**
Bachelor of Business Administration, Finance   *2016*

General Assembly   **Remote**
Data Science Immersive, Bootcamp   *2020*

- 500-hour full time Artificial Intelligence educational program strengthening Data Science skills including Python, SQL, Data manipulation, Data visualizations, Regression, Classification, Neural Networks, Web scraping, APIs, NLP, Time Series Analysis, Statistics, Advanced Supervised/Unsupervised Machine Learning