

# Joseph Baierl

(949) 769-1551 | [jtbaierl@cpp.edu](mailto:jtbaierl@cpp.edu)

## EDUCATION

**California State Polytechnic University, Pomona** – Major GPA: 3.82

**Pomona, California**

*Bachelor of Science*

Expected Graduation May 2021

*Double Major in Finance, Real Estate, and Law & Accounting*

- **Honors:** Dean's List 2016, 2017, 2018, 2019 | Beta Gamma Sigma
- **Relevant Coursework:** Python Applications in Finance, Data Mining, Accounting Information Systems, Financial Modeling, Financial Derivatives, Investments, Database Design, Evaluation of Financial Policy, Cost Accounting, Intermediate Accounting, Corporate Finance Theory, Statistics, Economics, Calculus

## WORK & LEADERSHIP EXPERIENCE

**Pacific Investment Management Company, LLC**

**Newport Beach, California**

*Product Analyst Intern*

June 2020 – August 2020

- Conducted in depth analysis on company's Diversified Income fund in relation to competitor funds
- Developed model to analyze optimal fund weighting in client credit allocations
- Analyzed correlation of internal credit ratings versus future rating agency ratings
- Presented projects and findings to group of managers and associates
- Created and presented user-guide for Preqin website detailing use cases and automation methods

**CFA Institute Research Challenge**

**Pomona, California**

*Equity Research Analyst*

November 2019 – February 2020

- Led team of five students to develop analyst report and value software company Alteryx (Ticker: AYX)
- Utilized Bloomberg, Excel, and Refinitiv to calculate weighted valuation derived from DCF and PEG ratio
- Presented investment recommendation and rationale to panel of CFA charterholders in a competitive format

**Nile Capital Group, LLC**

**Century City, California**

*Intern*

June 2019 – August 2019

- Performed regression analysis against asset managers' excess returns to explain relative performance
- Determined relevant benchmarks of asset managers' funds based on correlation and composition
- Assisted in writing investment committee memos of private asset management firms under consideration
- Designed descriptive graphics to promote the investment process of asset management firms through Python

**Student Managed Investment Fund**

**Pomona, California**

*Managing Director*

June 2019 – Present

- Placed 1<sup>st</sup> in CFAOC competition presenting RFP and portfolio recommendations panel of charterholders
- Lead portfolio management of over \$200,000 in assets for the Cal Poly Pomona investment fund
- Developed and back-tested GARP strategy which is used as the fund's primary equities approach
- Construct and optimize a portfolio comprised of a diversified mix of equity and fixed income securities
- Improved screening method of fund by incorporating Novy-Marx's profitability measures
- Quantify intrinsic equity valuations through DCF, DGM, and residual income models
- Reconcile return contribution differences using Brinson attribution methodology

**Finance Society**

**Pomona, California**

*President*

April 2019 – Present

- Grew club membership from 20 to over 60 students and actively lead meetings
- Host numerous industry professionals to assist members' professional and curricular development
- Expand commitment to CFA designation by providing practice exams, study materials, tutoring
- Coordinate guest speaker and corporate tour events relevant to the financial field
- Designed and presented workshops teaching members Excel, Python, and R

## SKILLS & ACTIVITIES

**Certifications & Training:** Bloomberg Market Concepts Certification | A Simple Model Training

**Activities:** President - Finance Society Club | Student Managed Investment Club - Scheduler

**Technical Skills:** Statistical analysis in Excel | Financial modeling in Excel | Java | Python | SQL