JUAN-BERNARDO RIVERO

Investment Analyst

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Nationality: Swiss • Mobility: Driver License

Profile

Results-driven investment analyst with over 10 years of experience in venture capital and private equity. Expertise in financial valuation, investment analysis, and AI applications in finance. Proven ability to develop strategies that optimize portfolio performance and drive business growth in fast-paced environments.

Core Skills

★ Transaction Execution

- Led the development of an online credit platform resulting in 3,000+ registrations in 90 days.
- Managed and licensed over 15 loan officers, increasing annual sales by 30%.

★ Valuation & Modeling

- Conducted comprehensive market analysis for AML/CTF SaaS solutions.
- Developed financial models to support investment strategies.

★ Dealwork & Coordination

- Identified partnerships and business opportunities in new customer segments.
- Coordinated export operations across multiple countries, improving fulfillment rates by 50%.

★ Commercial & Sector

- Spearheaded the introduction of new brands into European markets.
- Engaged in strategic outreach to cultivate partnerships aligned with business objectives.

★ Tools

- Proficient in Python, SQL, and advanced Excel for data analysis.
- Experienced with CRM tools like HubSpot and project management software such as Jira and Trello.

Experience

SGR Compliance S.A. • Business Development Specialist AML / CTF • Lugano • 2022 - 2023

- Designed Go-To-Market strategy for AML/CTF SaaS solutions.
- Sponsored international compliance events to enhance brand visibility.

And3s LLC • Project Manager • Florida / Lausanne • 2019 - 2021

- Led development of an online credit platform, achieving rapid user acquisition.
- Implemented Lean Startup Methodology to streamline project execution.

Lexios.io • Co-Founder – Growth • Lausanne • 2021

- Achieved over 500% growth in social media engagement, driving traffic to registration pages.
- Participated in Swiss EdTech Collider Startup Incubator for innovative growth strategies.

Prime Equity Financial Corporation • Business Development Manager • Florida • 2019 - 2021

- Designed and led training programs for mortgage loan originators.
- Drove digital transformation initiatives to diversify lead generation.

Swissxer S.A. • Head of Global Trading Operations and Business Development • Geneva • 2010 - 2017

- Directed global trade operations, improving trading margins by over 20%.
- Reduced supplier lead times by 15% through process optimization.

Earlier Experience

Export Manager • Nidecker Group • Rolle • 2007 - 2008

Coordinated export operations, enhancing fulfillment rates and reducing costs.

Market Analyst • JTI • Lausanne • 2008 - 2010

Provided data-driven recommendations for product development and pricing strategies.

Analyst • Merrill Lynch • Florida • 2001 - 2003

Supported corporate finance growth through strategic outreach and consultative selling.

Education

MBA Financial Valuation and Investment Management • Lynn University • USA • 2020

Executive Ed Entrepreneurship • Harvard Business School • USA • 2014

Business Information Systems • HEC Lausanne • Switzerland • 2006

BBA Management • Lynn University • USA • 2002

High School Diploma • Valley Forge Military Academy • USA • 1997

Certifications

- Certified Project Management Associate IPMA® Level D, IPMA 2023
- IBM Data Science Professional Certificate, IBM 2024

Languages

English - Bilingual/Native • French - Bilingual/Native • Spanish - Bilingual/Native • Italian - Intermediate

Technical & Tools

Excel (advanced: financial modeling and data analysis) • PowerPoint • Python (pandas, Matplotlib) • SQL • Bloomberg Terminal

Affiliations

Swiss EdTech Collider, EPFL Innovation Park • FAU Tech Runway, Florida Atlantic University

Volunteering

Committee Member – Innoboard, InnoPark Suisse

Interests

Sustainability • Reading • Technology • Calisthenics • Fitness • Boarding sports