

# 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 technology and finance sectors. Proven expertise in equity research, financial modeling, and investment analysis. Trilingual professional with a strong track record in entrepreneurship and strategic partnerships, adaptable to fast-paced environments.

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## Core Skills

### ★ Transaction Execution

- Executed successful Go-To-Market strategies for multiple startups.
- Led digital transformation projects increasing lead generation channels.

### ★ Valuation & Modeling

- Conducted financial valuations and due diligence for investment opportunities.
- Performed model maintenance for technology sector equities.

### ★ Dealwork & Coordination

- Identified and secured partnerships, enhancing business opportunities.
- Coordinated export operations across multiple countries.

### ★ Commercial & Sector

- Analyzed market trends to inform product development and pricing strategies.
- Developed strategic outreach initiatives to cultivate partnerships.

### ★ Tools

- Proficient in Bloomberg Terminal and Excel API.
  - Experienced with Python, SQL, and various CRM tools.
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## Experience

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

- Designed Go-To-Market strategy for AML/CTF SaaS solutions, enhancing market entry.
- Sponsored international compliance events, boosting brand visibility.

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

- Led development of an online credit platform, achieving over 3,000 registrations in 90 days.
- Implemented Lean Startup Methodology to optimize project outcomes.

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

- Achieved over 500% growth in social media engagement, driving user acquisition.
- Participated in Swiss EdTech Collider Startup Incubator, enhancing business strategy.

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

- Trained and licensed over 15 loan officers, increasing team efficiency.
- Achieved over 30% increase in annual sales through strategic initiatives.

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

- Directed global trade operations, improving trading margin by over 20%.
  - Reduced supplier lead time by over 15%, enhancing operational efficiency.
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## Earlier Experience

### Export Manager • Nidecker Group • Rolle • 2007 - 2008

Coordinated export operations, improving 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 growth initiatives in Corporate Finance through strategic outreach.

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## 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

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## Certifications

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

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

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## Technical & Tools

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

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## Affiliations

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

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## Volunteering

Committee Member – Innoboard, InnoPark Suisse

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## Interests

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