LUIZ MEDINA

FINANCIAL ANALYST

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ABOUT ME

Experienced Financial Analyst with 8+ years of relevant experience. Performed both investment and operational due diligence in more than 50 Funds and Hedge Funds. Organized the investment process from screening to investment, covering 1000+ investment funds. Created investment analysis programs in Python and dashboards in Power BI to support the investment and advisory of over one bn C$.

EXPERIENCE

INVESTMENT MANAGER RESEARCH ANALYST

F3 Capital | 2019 - Present · 3 yrs

Responsible for researching Hedge Funds to support the investment and advisory of over one bn C$.

- Performing and documenting on-site investment and operations Due Diligence reviews on investment managers. Preparing due diligence research reports and presentations and making investment recommendations before the investment committee. Periodically interviewing and documenting investment manager interviews.

- Propose and develop new investment analysis and machine learning tools to understand fund performance and identify potential outperformers. Document, test, and organize existing code repository. Organize databases and data flow in Python.

- Work with Client Solutions area to deliver research and BI dashboards to support presentations to existing and prospective clients.

- Accomplishments: diversified investment portfolios adding new investment strategies; created offshore investment vehicle to diversify currency risk; systematized investment process and created BI dashboards to structure its framework; trained and managed seven members; automated investment analysis and presentation generation.

INVESTMENT OPERATIONS ANALYST

F3 Capital | 2017 - 2018 · 1 yr 7 mos

Responsible for automating processes, performing risk and return, and portfolio optimization analysis

- Worked with the investment manager to perform investment manager analysis for Fund of Funds investing and conducted ad hoc research to support investment decisions.

- Solved daily operational issues, working closely with fund administrator, custodian, and client's back office. Kept and organized operational and control databases and systems.

- Managed relationships with internal and external partners and stakeholders. Responded to investment inquiries from internal and external key stakeholders, and market sources

- Accomplishments: created Python-based portfolio optimization tool, fully automated back-office processes for 15 funds; developed legislation constraint checker for portfolios.

GRADUATE RESEARCH FELLOW | COMPUTER SCIENCE PROGRAM

University of Sao Paulo | 2015 - 2017 · 2 yrs 3 mos

Master's thesis: Dynamical system identification in Real Estate stock data.

JUNIOR BUSINESS ANALYST

Petrobras | 2012 - 2014 · 1 yr 7 mos

Responsible for the financial follow-up and analysis of oil exploration and drilling projects.

- Performing cash-flow and ratio analysis on projects and collaborating with internal and external auditing teams.
- Performing tax planning and optimization of contracts.
- Achieved 12th place among 38,532 candidates in the hiring exam.

TRADING DESK INTERN

Crédit Agricole | 2010 - 2011 · 1 yr

- Developed cash-flow and liquidity analysis tools in Excel VBA.
- Researched and tested investment strategies and technical indicators.

EQUITY RESEARCH INTERN

Banif | 2008 - 2009 · 1 yr

- Developed and maintained valuation models for companies in the Real Estate sector.
- Conducted market and economic analysis and prepared research reports.

EDUCATION

BACHELOR'S IN BUSINESS ADMINISTRATION
University of Sao Paulo | 2006-2011

MASTER'S IN COMPUTER SCIENCE
University of Sao Paulo | 2015-2018

CERTIFICATIONS AND COURSES

CFA Level I: passed
Caltech: Learning from Data - Online Course
ZTM: Complete Python Developer - Online Course
ZTM Complete SQL and Databases Bootcamp - Online Course
Microsoft Power BI Desktop for Business Intelligence - Online Course

SKILLS

Python   SQL   Machine Learning   VBA   Power BI   MATLAB   Git

LANGUAGE

ENGLISH
C1/C2 · IELTS

FRENCH
B2/C1 · TEF

PORTUGUESE
Native · Brasil