Kevin Marquez

Mississauga, ON
(647) 551-4445
marquezb@sheridancollege.ca
www.linkedin.com/in/marquezb-kevin

SUMMARY:

Bachelor of Finance student with in-depth knowledge of capital markets and interest in visualizing data. Combining technical skills in Excel and interests to create various stock screeners, financial models, and data analysis tools.

Technical Skills:
- Excel: Solver, Pivot Table, Macros, Visual Basic for Applications
- Word, PowerPoint, FactSet

EDUCATION:

Honours Bachelor of Business Administration (Finance)   2021 - Present
Sheridan College Pilon School of Business – Mississauga, ON
Expected Graduation date: May 2025

ACADEMIC & PERSONAL PROJECTS

Portfolio Management Project
- Utilized Excel Solver to calculate the optimal risk-adjusted return
- Constructed a portfolio consisting of 16 stocks and calculated total portfolio risk and Sharpe ratio
- Compared portfolio to benchmark and analyzed returns using the Brinson–Fachler model

Intermediate Accounting 1 Course
- Developed knowledge in various accounting principles based on ASPE and IFRS standard
- Prepared multi-step income statement, financial position and cash flow statement
- Calculated using different methods of depreciation, amortization and fair value

Company and Industry Analysis Project
- Constructed Three-Statement model for two companies with data retrieved from FactSet
- Conducted horizontal and vertical analysis to compare company's performance
- Calculated current ratio, acid-test ratio, debt ratio of both companies

Data Research and Report Project
- Proposed research on correlation between employee attire and impact on customer integrity
- Tested various hypotheses using crosstab test, chi-square test, and linear regression using SPSS
- Discussed the limitation of the research process and proposed recommendations

Yahoo Finance Stock Screener in Excel
- Built a stock screener using macros and VBA scripts to automate pulling historical data from Yahoo Finance as a text query
- Utilized VBA scripts to organize text query into a worksheet and built a dashboard to visualize price trend and volume

Autotrader dataset analysis tool
- Organized and cleaned large dataset of listings in Autotrader from a csv file acquired online
- Utilized pivot table and macros to visualize and compare price trends of different car models

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WORK EXPERIENCE:

Lifeguard/Swim Instructor   2017 – Present
City of Mississauga
- Instructed swimming and first-aid of all levels and age groups
- Conducted final evaluation of students based on Lifesaving Society's Swim for Life program
- Worked with clients individually to overcome difficult hurdles in their swimming progress