

Max Sands

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EDUCATION

Business Science University – Online University for Data Science

2022

Certified:

- Data Science for Business w/ R
- ML & High-Performance Time Series Forecasting w/ R
- Predictive Shiny Web Applications w/ R
- Shiny Development w/ R & AWS

McGill University – Desautels Faculty of Management, Montreal, Canada

2019 - 2022

Bachelor of Commerce, Major in Finance, Double Concentration in Accounting & Statistics, CGPA: **3.86/4.00**

WORK EXPERIENCE

Choate Hall & Stewart / Choate Investment Advisors, Boston, United States | *Business Analyst*

2022 - Present

- Providing general investment research for the Equity and Fixed Income teams
 - Built automated preliminary Investment Analysis report using R and Quarto
 - By providing a ticker and a list of comps, a report is generated that gathers data from Bloomberg and performs key metric ratio analysis, market share analysis, business segment analysis, etc. to provide a preliminary valuation
- Developing unique solutions and models for the Investment and Operations divisions:
 - Built in-house Monte Carlo Simulation Tool for Retirement Analysis w/ Clients
 - Includes Sensitivity Analysis across several key inputs
 - Includes report generation – both static PDFs and interactive HTML
 - Built automatic Drift Analysis report using R and Quarto that provides insights on accounts that are drifting off model
 - Cleaned and formatted data of our largest clients for migration into Addepar

McGill University, Montreal, Canada | *Teaching Assistant – Advanced Business Statistics*

2021 - 2022

- Delivered lectures, mentored/tutored students, and graded all assessments – typically reserved for Graduate Students

IronHold Capital (Hedge Fund), New York, United States | *Executive Assistant & Analyst*

2020 - 2021

- Worked directly under the CIO and conducted research on Indian and U.S. Equities – the fund followed a Value-based strategy
- Author of the Fund's newsletter that covered key economic events, political news, and Family Office industry insights

Private Tutor, Mountain Lakes & Montreal, United States & Canada

2018 - 2021

- Tutored students in Mathematics, Statistics, Physics, English, and Finance, and revised college admission essays

PERSONAL PROJECTS

Replicating Ray Dalio's Work: Forecasting the 'Big Cycle' & 'Debt Cycles' – (in progress)

2022 - Present

- Building a system that gathers relevant data and uses Machine Learning to predict several countries' current and future stages of their 'Big' & 'Debt' Cycles with the eventual goal of predicting asset returns across classes, sectors, and geographies

Insider Trading – Scraping SEC Form 4 Filings – (in progress)

2022 - Present

- Wrote code in R that scrapes the SEC Edgar site and all of its Form 4 Filings to develop a trading strategy

Coding w/ Bloomberg – Automating Equity Screens & Preliminary DCFs

2022

- Wrote code in R that utilized Bloomberg's Desktop API to scrape and gather data for analysis
 - Automated Bloomberg's EQS function so that I could run continuous equity screens (i.e. every 'Saturday' since MM/DD/YY)
 - Used scraped information to automate the generation of a preliminary DCF for any company; companies with a significant discrepancy between 'rough draft' implied share price and 7-day VWAP would garner additional refined analysis

Coding w/ Amazon Web Services (AWS), Gemini, & Kraken – Automating Cryptocurrency Trading Strategy

2022

- Wrote code in Python that connected to Gemini & Kraken APIs and allowed me to place trades if certain conditions were met; automated trading by running the code externally every 5 minutes through AWS CloudWatch & AWS Lambda

SKILLS AND INTERESTS

Language & Computer Skills: Fluent English & French, Advanced R & Basic Python

Interests: Data Science, Weightlifting, Guitar, Golf, Chess, Poker, Football, Basketball, Math, Rock Climbing, Reading

Influential Role Models: Ray Dalio, Andrew Huberman, members of the All-In Podcast