**Max Sands** (973) 356-7700 • [www.max-sands.com](http://www.max-sands.com) • [maxsands700@gmail.com](mailto:maxsands700@gmail.com)

**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