

SHREY PATEL

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EDUCATION

University of Illinois at Urbana-Champaign – Gies College of Business

Expected Graduation: December 2024

Bachelor of Science in Finance

GPA: 3.95/4.00

Investment Management Academy – Champaign, IL

April 2023 – Present

Senior Analyst

- Provided recommendations and investment price targets for a \$1.4 million long-only equity portfolio by building three-statement models, writing equity reports, and using S&P Capital IQ, Bloomberg Terminal, and Thomson Reuters Eikon Research
- Conducted portfolio updates on current holdings in the Russell 2000 and researched new potential investments to pitch

Adventis FMC Level II Certification

- Built a fully dynamic and properly formatted three-statement financial model with five supporting schedules
- Determined an intrinsic valuation utilizing discounted cash flow, leveraged buyout, and sensitivity analyses

EXPERIENCE

Lincoln International – Chicago, IL

May 2024 – July 2024

Analyst

- Assisted the Valuation and Opinions Group with conducting portfolio valuations of debt securities and credit facilities
- Created executive summary files, consolidated final valuation reports for clients, spread financial information and conducted valuation analyses in Excel, and analyzed credit agreements as well as financial covenants

D & S Realty LLC – Elgin, IL

June 2023 – August 2023

Analyst

- Conducted market research and evaluated potential investment acquisitions by analyzing cash flow, capitalization rates, and vacancy rates of multifamily apartment buildings
- Tracked monthly financials and investment metrics for a portfolio of investment properties in addition to assessing and reviewing tenant lease agreements

Illinois Investment Banking Academy Case Competition – Champaign, IL

October 2022

Sell-Side Analyst

- Advised on the sale of Lululemon Athletica to a panel of investment banking professionals by providing comprehensive analysis on Lululemon's position and growth within the athletic apparel industry
- Identified key investment highlights and competitive advantages that would appeal to potential financial and strategic buyers
- Constructed a financial model containing comparable companies, precedent transactions, and discounted cash flow analyses to reach a valuation range of \$45.08bn – \$48.27bn with an implied share price of \$350 – \$375

LEADERSHIP AND INVOLVEMENT

Venture Capital Association – Champaign, IL

February 2023 – May 2023

Analyst

- Engaged in weekly meetings involving valuation methodologies, fund structures, investment strategies, and case studies
- Developed an understanding of the different types of financing rounds that venture capital firms use to invest in companies

Prime Mergers and Acquisitions – Champaign, IL

January 2022 – December 2022

Associate

- Participated in weekly lectures ranging from topics involving the investment banking industry, corporate finance, valuation methodologies, deal structure, and financial modeling
- Developed a valuation pitchbook utilizing comparable companies, precedent transactions, and discounted cash flow analyses to determine the approximate enterprise value range of New Balance

Hedge: Equities, Options, and Alternatives – Champaign, IL

January 2022 – May 2022

Analyst

- Participated in weekly meetings to gain knowledge on fundamental and technical analysis, derivatives, macroeconomics, portfolio construction, and risk management
- Developed a diversified portfolio of investments for a hypothetical client with a group of analysts involving commercial real estate, growth stocks, ETFs, covered calls, and gold

Investment Portfolio Organization – Champaign, IL

September 2021 – December 2021

Analyst

- Participated in weekly lectures and stock market updates involving financial statement analysis and equity research utilizing Capital IQ and IBISWorld
- Developed a stock pitch presentation and equity report that utilized detailed research on Lattice and the semiconductor industry with a group of analysts, along with placing 2nd in the team stock simulation where we invested \$1 million dollars' worth of securities in the Russell 2000

HONORS, ACTIVITIES & INTERESTS

Honors: Gies Business Dean's List (2023), National Honor Society, Illinois State Scholar, 1st Place Caterpillar Case Competition

Activities: Phi Delta Theta Social Fraternity, Wall Street Prep Financial and Valuation Modeling, Intramural Basketball

Interests: NBA, International Soccer, Chicago Bulls, Investing, Chess, Hip Hop Music, Tutoring, Action Movies, Traveling