

# MARCO SOUZA

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## SUMMARY

**Financial Analyst with 3+ years of experience in Financial Markets.** Managing \$50+ million in investment assets. Proficient in Python, R and SQL. Expert in quantitative methods. Skilled in financial analysis, modeling, and forecasting, with a **strong track record in reducing costs and providing data-driven insights.** Fluent in English and French.

## RELEVANT EXPERIENCE

### Financial Analyst

Sep 2023 – Jan 2024

S.T.R.E.A.M.S.

St. John's, NL

- **Reduced project completion time in 19%**, by implementing data-driven KPIs.
- **Decreased operational costs by 15%** by providing strategic insights to management based on financial analysis.
- **Conducted company valuations and financial modeling**, utilizing Excel and Discounted Cash-flow (DCF).
- S.T.R.E.A.M.S is an education start-up based in St. John's that delivers innovative educational methods through smartphone apps.

### Research Assistant

Nov 2022 – Jan 2024

Memorial University of Newfoundland and Labrador

St. John's, NL

- **Analyzed datasets with over 100,000 observations** using Python and Stata.
- **Developed quantitative models and led research** on subjects relevant to public policy.
- **Only graduate student in my cohort to secure more than \$6000 in research funding.**

### Middle Office Analyst

Apr 2021 – Apr 2023

Invest Partner Ltda.

Remote, Brazil

- **Managed \$50+ million in investment assets** for more than 100 clients.
- **Achieved NPS of 9/10, 6% above company average**, by providing excellent customer service.
- **Researched and analyzed 100+ stocks, bonds and derivatives** to provide the best investment alternatives for clients.
- **Prepared and presented meetings to more than 30+ stakeholders**, summarizing relevant news in four different languages.
- **Invest Partner** is one of the most traditional investment advisory offices in Brazil. **The company manages more than \$ 500 Million and is associated with XP Inc., a NASDAQ-listed company.**

## EDUCATION

### Master of Arts in Economics

2022 – 2024

Memorial University of Newfoundland and Labrador

St. John's, NL

### Graduate Certificate in Finance, Investments and Banking

2021 – 2022

Pontifícia Universidade Católica do Rio Grande do Sul

Remote, Brazil

### Bachelor of Science in Economics

2017 – 2020

Universidade Estácio de Sá

Rio de Janeiro, Brazil

## SKILLS

**Technical** Python, R, SQL, Power BI, Stata, Microsoft Suite (Excel, Word, Powerpoint).

**Languages** French, English, Spanish and Portuguese.