DHYAN PATEL

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EDUCATION

University of Waterloo — **2022 – Expected 2027**
Honors Mathematics with Finance and Statistics Major and Computing Minor — *Waterloo, ON*

- **Relevant Coursework:** Portfolio Optimization Models; Bayesian Statistics; Time Series; Stochastic Processes; Computational Methods in Business & Finance (*Monte Carlo*, numerical optimization); Financial Mathematics; Investment Science (Black–Scholes), options/Greeks); Financial Markets; Linear Algebra; Probability & Statistics, Portfolio Optimization
- **CFA Level 1 Candidate**

EXPERIENCE

RP Investment Advisors (Global Fixed Income) — **May 2025 – Aug 2025**
Investments and Operations Analyst — *Toronto, ON*

- Automated fund-level data consolidation and reconciliation using VBA/Excel, improving fixed-income **portfolio reporting** accuracy and enabling faster daily NAV and P&L updates.
- Supported **fixed income portfolio managers** by reconciling daily fund performance, analyzing P&L variances, and using **Bloomberg** to identify pricing discrepancies, ensuring accurate **investment reporting** and fund allocation.
- Investigated discrepancies in daily fund returns (pricing errors, settlement mismatches, timing differences), supporting **accurate performance attribution and monitoring.**
- **Analyzed financial trends** and revenue/expense drivers to provide inputs for portfolio evaluation and allocation discussions.

UW Stocks Club — **May 2024 – April 2025**
Equity Research and Quant Analyst — *Waterloo, ON*

- **Engineered and automated equity data pipelines using Python** and SQL to track portfolio performance, sector weights, and factor exposures, improving the accuracy of investment reports by 50%.
- Built multi-factor **DCF and relative valuation models** for North American equities, integrating factor sensitivities (beta, momentum, quality) and scenario testing to refine position sizing and **portfolio diversification.**
- Designed **Python-based dashboards to visualize** valuation metrics (P/E, EV/EBITDA, ROIC) and backtest historical sector and style performance, supporting data-driven allocation discussions.

ACTA Consulting — **Sep 2024 – Dec 2024**
Financial Consultant — *Dubai, UAE*

- Built and distributed a **daily "overnight markets" brief** summarizing key macro and company news, index and rate moves, and major catalysts to prepare stakeholders ahead of market open.
- Built **simple scenario and sensitivity analysis** (rates up/down, spread widening, equity drawdown) to **quantify portfolio impacts** and communicate results clearly.
- Prepared clean charts and exhibits for PM updates and client materials, turning raw data into decision ready visuals and commentary.

GrandBridge Energy — **Jan 2024 – April 2024**
IT Analyst — *Brantford, ON*

- Automated data organization and reporting processes using VBA and Excel, improving workflow efficiency and ensuring accurate data management for system performance analysis.
- Conducted **market research** on headphone brands, analyzed cost-performance metrics, and presented insights using Power BI to the VP of IT, facilitating a data-driven purchase decision.

EXTRA CURRICULAR

- Built a Python pipeline using **yfinance**, **pandas**, **NumPy**, and **Plotly** to pull historical price data from **Yahoo Finance** for a multi-equity universe, transforming raw outputs into a clean dataset powering an interactive dashboard.
- Built a full **FCFF DCF plus comps valuation** of **Aritzia (TSE: ATZ)** from scratch by translating company and industry research into key operating drivers and a 5-year forecast; estimated a **9.23% WACC** and ran sensitivity analysis, resulting in an intrinsic value of ~**CAD 105–106/share** versus **CAD 82.22** market price (~**28% upside**).

SKILLS & INTERESTS

Technical Proficiency: Excel (Advanced Modeling, Macros), VBA, SQL, Power BI, **PitchBook, Bloomberg and Capital IQ**
Valuation & Analysis: DCF, M&A Analysis, Forecasting, Backtesting, Performance Attribution, Portfolio Optimization
Programming: Python, SQL, VBA, C, JS, Linux
Certifications: Financial Modeling Certification (FMC®) - Adventis, Investment Banking - Bank of America (Forage JobSim)
Interests: Formula 1, Soccer, Gaming, Poker Strategy, Debate Tournaments, Chess