

Robert J. Kirk, CFA

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PROFESSIONAL EXPERIENCE

Wolfe Research

Senior Associate, Equity Research

New York, NY

2021 - 2022

- Worked under the #1 II ranked analyst to launch coverage across 20 companies within mining, steel, specialty materials and building sectors.
- Lead associate responsible for analyzing investment opportunities across the industry through a combination of top-down and fundamentally driven analysis. Created and maintain financial models for all companies under coverage.
- Consistently interacted with investor relations and management teams within our coverage universe; as well as with clients regarding our investment thesis, economic and company-related outlooks.
- Created supply & demand model across commodities, responsible for overall commodity strategy and providing pricing forecasts.

Bloomberg, LP

Bloomberg Intelligence, Senior Equity Research Associate, Metals and Mining

Princeton, NJ

2017 - 2021

- Manage team of junior analysts to ensure consistent data quality across coverage universe; timely model updates and ad-hoc projects are successfully delivered
- Write comprehensive industry, company and ESG research covering bulk/base/precious metal sectors
- Forecast supply & demand outlooks across base/bulk materials sector; create and maintain industry models under coverage
- Regularly interact with company management and investor relations teams within coverage universe; as well as with clients regarding our investment thesis, company-related outlooks

Equity Product Strategy, Product Manager, Mining Asset Database

2016 - 2017

- Lead end-to-end product manager of Bloomberg's Mining Asset Database. Responsible for creation and execution of the business plan, budgeting resources and defining/tracking KPI metrics
- Manage a cross-functional team of ten, including members from sales, data, and research departments working toward the creation of a competitive product in the global metals industry
- Research and develop key insights for multiple automated news initiatives, including development of hierarchy for market moving insights, researching viable correlations between various indices and key company metrics

Equity Product Strategy, Enhanced Fundamentals

2014 - 2016

- Played critical role in creation of new Enhanced Fundamentals product that resulted in an increased annual revenue of \$4M in new terminal sales
- Oversaw 200+ vendors & contracted employees working in India and Bangladesh to ensure all aspects of business plan were met; including production, quality and Q&A
- Developed quality control tools to standardize abnormal items within company filings for all Bloomberg equity analysts globally; resulting in a uniform product across markets

Morgan Stanley

Wealth Management Associate

Red Bank, NJ

2013 - 2014

- Collaborated with brokers and branch managers to make sure equity options were allocated, ticketed, and successfully transferred on a timely basis.
- Executed trade adjustments, fund transfers, IPO Certifications and IRA distributions.

SKILLS & INTERESTS

- **Technical Skills:** Bloomberg Terminal, Financial Modeling, FactSet, GAAP/IFRS Accounting
- **Programming Skills:** Javascript, Python, SQL, MongoDB, React, Django, EQS, CSS, HTML
- **Certifications:** CFA Charterholder, SEI Software Engineering Program

EDUCATION

Monmouth University

- B.S. in Economics; minor in Political Science

West Long Branch, NJ