

RYAN PATEL

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PROFESSIONAL EXPERIENCE

Meridian Capital Partners Greenwich, CT
Investment Professional, Generalist – Soft Catalyst & Fundamental Long/Short Mar 2023 – Present

- Primary investor responsible for managing the only long short fundamental equity portfolio at Meridian Capital Partners
- Lead investment decisions for the portfolio including sizing of positions based on conviction level/idiosyncratic volatility, hedging of positions using public peers and/or appropriate sector ETFs/market indices, and timing of position initiation and monetization
- Generate new investment ideas based on detailed and disciplined diligence processes, including meetings with C-Suite Executives/IR, calls with third-party experts, attending industry conferences, and analyses of alternative datasets provided by third parties
- Provide portfolio updates on a bi-weekly basis to Meridian's Founder/CIO and CRO including formal quarterly updates/presentations on position level performances, hit rates, and key risk metrics such as target volatility and factor attribution

Millennium Management New York, NY
Investment Analyst, Consumer & TMT – North53 Capital Sep 2021 – Aug 2022

- Principal analyst responsible for managing the Consumer and Technology portfolio within the \$4.2bn gross portfolio for Vertex Capital
- Co-managed the risk exposures of the Consumer and Technology portfolio with the Senior Portfolio Manager including discretion over position sizing (idiosyncratic volatility/conviction), alpha/factor exposures (hedges), and timing of position entry/exit
- Presented new investment ideas based on fundamental analyses, primary research, industry events/conferences, sector expert consultations, and company management meetings; actively present findings/ideas through written memos and deep dive analyses
- Constructed and maintained financial models for core positions, with analyses evaluating growth drivers, competitive positioning, and structural/strategic transformation; includes operating model, DCF, comparable companies, LBO, and precedent transactions

Apollo Global Management New York, NY
Associate – Private Equity Aug 2019 – Aug 2021

- Evaluated and executed private equity investments across the Business & Technology Services, Consumer, and Healthcare industries
- Performed due diligence on businesses to determine competitive advantages, key growth drivers, addressable markets, and risks
- Worked directly with management at portfolio companies to manage any operational and liquidity risk, particularly during COVID
- Board observer: Strategic Safety Solutions (global industrial consulting firm), MedTech Manufacturing (medical device contract manufacturer)

J.P.Morgan New York, NY
Analyst – Healthcare Investment Banking Summer 2016; Jul 2017 – Jul 2019

- Ranked top tier of analyst class in two years at J.P. Morgan; winner of Firmwide Summer Analyst Financial Modeling Competition
- Participated in all aspects of M&A, equity, and debt transactions including idea generation, due diligence, and valuation

Selected Transaction Experience:

- Exclusive financial advisor – BioPharm Corp's \$8.5bn acquisition of Oncology Therapeutics Inc
- Exclusive financial advisor and lead-left arranger of financing – Blackstone Life Sciences' acquisition of Clinical Research Partners

VOLUNTEER & LEADERSHIP EXPERIENCE

Global Education Alliance

Mumbai, IN

Co-Founder

Jan 2017 – Present

- Created a non-profit organization dedicated to providing educational resources, technology access, and vocational training to underserved communities
- 65+ students have completed certification programs and secured employment in technology and manufacturing sectors throughout the Maharashtra region

Beta Alpha Psi, Gamma Chapter – Professional Business Fraternity

New York, NY

President, Alumni Relations Chair, Finance Committee

Feb 2014 – May 2017

- Led 140+ members and organized signature events across Columbia Business School, earning Outstanding Organization Award among 30+ student groups
- Managed relationships with 400+ active alumni and coordinated 3 professional networking events per semester, increasing alumni engagement by 65%

EDUCATION

Columbia Business School, Columbia University

New York, NY

Bachelor of Science in Business: Concentration in Finance and International Business, Minor in Statistics

Sep 2013 – May 2017

- GPA: 3.61/4.00 | SAT: 1480/1600 (Math: 750, Verbal: 730) | Dean's Merit Scholarship (awarded for all four years)
- Honors: Student Leadership Excellence Award (awarded to top 3 graduating seniors), Academic Achievement Recognition
- Finalist in Goldman Sachs Investment Banking Case Competition, Winner of Morgan Stanley Financial Markets Challenge

ACTIVITIES & INTERESTS

- Cricket (University Team Captain), Formula One Racing, International Cuisine, Beach Volleyball, Music Production (Electronic/House)