 Michael Rodriguez, CFA

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| Home Address: | Contact Information: |  |
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|  | EDUCATION |  |

University of Michigan, Ross School of Business– Ann Arbor, MI May 2017

Bachelor of Science in Business GPA: 3.5/4.0

Major: Finance

• Business Leadership Program: Selected as one of 120 Ross students out of a class of 1,200 admitted into competitive program based on leadership potential and academic performance to complete advanced integrative coursework

• Merit Scholar Program: Awarded partial scholarship by selective Ross program recognizing academic excellence and leadership through active participation in community service programs and peer mentoring

• CFA Charterholder: Passed Level III in June 2021 after completing the previous two levels consecutively

• FINRA: Registered Representative and active holder of Series 7, 63 and 87 licenses during equity research tenure

Technical Skills: Bloomberg Terminal, Excel, Advanced Financial Modeling, Statistical Analysis, Hypothesis Testing, FactSet, S&P Capital IQ

# EXPERIENCE

Fidelity Asset Management – Boston, MA May 2022-Present

Analyst, Consumer Internet & Software

* Initiated on 20+ names across TMT sector through diligence on public filings, industry experts and valuation analysis
* Contributed to weekly portfolio review committee and investment process meetings to determine equity allocation across $1-2 billion AUM mutual fund
* Met directly with management teams as a part of investment process to assess corporate strategy & initiatives

William Blair, Equity Research – Chicago, IL April 2019-January 2022

Associate, TMT

* Covered 20+ names across TMT sector providing quarterly earnings estimates and research reports
* Wrote coverage initiation reports and built IPO syndicate models from scratch on 10+ consumer internet companies
* Built and updated models with earnings releases to prepare notes with adjusted forecasts and valuation metrics
* Published a differentiated 70+ page report on 3D printing industry highlighting 29 competitors with extensive discussion of technology, products, pricing and financial performance; researched forward looking manufacturing trends

William Blair, Fixed Income Sales & Trading -- Chicago, IL April 2018-April 2019

Jr. Desk Analyst

* Contributed fundamental research for clients on various HY, XO and IG credits as a junior desk analyst by building three-statement valuation models to pitch relative value ideas and drive desk revenue across coverage of 10+ names
* Priced 100+ corporate bonds daily for inventory RUNZ on Bloomberg and ALLQ quoted markets
* Responsible for odd lot market making in High yield, Investment Grade and Hybrid securities up to $500m

Guaranteed Rate, Mortgage Trading – Chicago, IL July 2017-March 2018

Capital Markets Analyst

* Managed mortgage origination pipeline for strategic lending partnership utilizing Excel, SQL and proprietary risk management systems to hedge interest rate exposure through MBS forward contracts

Magnetar Capital Management, Summer Intern– Evanston, IL May 2016-August 2016

* Structured, pooled and delivered residential mortgage loans weekly exceeding $30M into agency and non-agency securitization products

# ACTIVITIES

Ross Investment Banking Club March 2015-May 2017

* Viewed banking firm presentations, networked with professionals and participated in financial modeling exercises

Campus Tutoring Service – Ann Arbor, MI January 2015-May 2015

* Tutored individuals in one-on-one sessions on the subjects: Macroeconomics, Excel, Finite Math and Accounting

# INTERESTS

Tennis Basketball Snowboarding Fitness & Training