**Vikram Shah, CFA**

[Vshah@gmail.com|](mailto:Vshah@gmail.com|) 267-328-0909

# PROFESSIONAL EXPERIENCE

## Cinctive Capital Management, New York, NY *Sep 2021 - Present*

### Investment Analyst

* Work directly with portfolio managers to deploy long/short equity strategy across ~75 Technology/Media stocks under coverage (with primary focus on cloud computing and digital advertising sectors)
* Source investment ideas through fundamental research, financial KPI analysis, alternative data tracking, and macroeconomic trend analysis across covered sectors
* Conduct quarterly management meetings to discuss strategic initiatives, growth opportunities, operational efficiency programs, and competitive positioning within industry verticals
* Develop tactical trading strategies around earnings events and create detailed investment previews highlighting recommended actions based on consensus expectations, proprietary data analysis, valuation metrics, and catalyst timing
* Coverage includes leading technology companies across cloud infrastructure, e-commerce platforms, digital advertising, streaming services, enterprise software, mobility platforms, online marketplaces, social media, and digital entertainment sectors

## Goldman Sachs, New York, NY *Feb 2019 - Sep 2021*

### Equity Research, U.S. Internet & Interactive Entertainment – Associate

* Supporting coverage of technology and media sectors for Institutional Investor ranked equity analyst team covering 40+ stocks with over $4.5 trillion in combined market capitalization
* Built comprehensive financial models and conducted fundamental analysis to generate investment recommendations using DCF, comparable company, and sum-of-the-parts valuation methodologies
* Maintained relationships with institutional investor clients including hedge funds and mutual funds, providing sector insights, company-specific research, and investment forecasting to support their decision-making processes
* Supported IPO due diligence for eight investment banking transactions, contributing to pre-marketing investor education, financial model construction, valuation analysis, and research coverage initiation

## J.P. Morgan Asset Management, New York, NY *Jul 2017 - Feb 2019*

### U.S. Equity, Business Management – Associate

* Coordinated research vendor relationships for 120+ Portfolio Managers and Research Analysts across 180+ external research providers, implementing process improvements following regulatory changes
* Analyzed assets under management and capital flows with Chief Investment Officers to determine optimal capacity targets and strategic positioning across 50+ active investment strategies
* Managed vendor relationships with research networks, data providers, and analytics platforms to enhance investment decision-making capabilities

## J.P. Morgan Chase & Co., New York, NY *May 2016 - Jul 2017*

### Office of the CFO, Strategy and Analytics – Analyst

• Analyzed the firm’s expense drivers (such as strategic investments, headcount growth, and location presence) and partnered with business lines to forecast a three year budget that aligned with the CFO’s key priorities

**PwC,** New York, NY ***Aug 2014 - May 2016***

### Corporate Development & Transaction Services (CDTS) – Analyst

• Developed comprehensive financial models (P&L, balance sheet, cash flow projections) supporting origination of complex client engagements and strategic transaction advisory services

# EDUCATION

## Northwestern University - Kellogg School of Management, Evanston, IL *Graduated May 2014* *Bachelor of Science in Business Administration*

Cumulative GPA: 3.44/4.00

• Dean’s Honor List (Fall 2012 - Spring 2014), Greek Award of Distinction (2011, 2012)

Northwestern University - Kellogg School of Management, Evanston, IL Graduated May 2014

# CERTIFICATIONS/LICENSES & SKILLS

* **CFA® Charterholder, CFA Institute:** Issued March 2019
* **Skills:** Bloomberg, FactSet, Microsoft Office, Financial Modeling, Mandarin (fluent), Cantonese (conversational)