

# Rishi Jain

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## EDUCATION

### UNIVERSITY OF VIRGINIA

*B.A. in Applied Statistics (Concentration in Finance)*

Charlottesville, VA

*Expected May 2027*

- **GPA:** 3.92/4.00; **SAT:** 1540/1600
- **Relevant Coursework:** Financial & Managerial Accounting, Financial Services Industry, Introductory Economics, Behavioral Finance, Foundations of Statistics, Computational Problem Solving, Introduction to Regression Analysis
- **Awards:** Runner-up Finalist – 2024 Kelley School of Business National Consulting Case Competition

## WORK EXPERIENCE

### GUGGENHEIM SECURITIES

*Incoming 2026 Investment Banking Summer Analyst*

New York, New York

*June 2026 – August 2026*

### DISTRICT CAPITAL PARTNERS

*Incoming 2025 Investment Banking Summer Analyst – Technology M&A Group*

Washington, D.C.

*June 2025 – August 2025*

### MCLEAN INVESTMENT GROUP LLC

*Founder & Investor*

McLean, VA

*January 2024 – Present*

- Leading a team of 6 members in actively managing a long-only, value-oriented public equities portfolio with \$4K AUM
- Sourced investment targets for a Boston-based PE client looking acquire a B2B SaaS business with <\$7.5M in revenue
- Select Pitch Experience
- Researched the East Coast railroad duopoly and went long in CSX and NSC to capture industry and idiosyncratic upsides
- Pitched S&P Global (SPGI) long, highlighting a market overreaction despite company fundamentals remaining unchanged
- Pitched LVMH long, emphasizing market overreaction to revenue dip and succession concerns despite strong fundamentals

### BLACK PEARL INVESTMENTS

*Investment Banking Summer Analyst*

New York, New York

*June 2024 – August 2024*

- Created client presentations, investor proposals, marketing materials, term sheets, and pro forma financial statements
- Selection Transactions
- *Underwrote a multifamily real estate development in Brooklyn*
  - Created a 10-year pro forma operating statement forecasting rent revenues to assess the impact of a government subsidy and affordable housing tax relief program to offset income deficits from reduced rent (80% to 60% AMI)
  - Calculated NOI and conducted an NPV and IRR analysis to assess the profitability and return on investment
- *Assisted in valuing Segi Sports, a subsidiary of Sycamore Entertainment Group (SEGI)*
  - Analyzed and forecasted future contract values for 23 professional athletes across the NFL, NBA, and MLB
  - Projected contract fee revenue and developed assumptions for marketing, sponsorship, and life insurance fees

## EXTRACURRICULARS

### VIRGINIA VENTURE FUND

*Director of Training*

Charlottesville, VA

*September 2024 – Present*

- Selected among 5% of applicants to evaluate buy-side investments and engage in externships with VC/PE partner firms
- Pitched Orbital Sidekick, a satellite imaging startup revolutionizing pipeline safety and agriculture monitoring with proprietary satellite technology, highlighting wide economic moat, scalability, product/market fit, and long growth runway
- Developing and leading a 10-week training program for new analysts covering accounting fundamentals, competitive strategy, company valuation, leveraged buyouts, financial modeling, investing fundamentals, and PE/VC investing

### GLOBAL MARKETS GROUP

*Investment Associate (American Equities Fund)*

Charlottesville, VA

*September 2024 – Present*

- Selected among 4% of applicants to engage in equity research and portfolio management for a \$30K AUM L/S equity fund
- Completed a 12-week finance training program covering investing fundamentals, company/industry analysis, and DCFs

## OTHER ACTIVITIES, SKILLS, & INTERESTS

**Other Activities:** Alpha Kappa Psi Professional Business Fraternity (Finance Mentor), Virginia Poker Club, Club Pickleball

**Languages & Technical Skills:** Microsoft Office Suite, Python, R Studio, SQL, S&P NetAdvantage, S&P Capital IQ

**Interests:** Texas Hold'em Poker (~\$12k in earnings), Weightlifting, Cooking, Hiking, Christopher Nolan Movies