Investment Banking Roadmap for CS Graduates

Month 1-2: Finance & Accounting Basics - Books: - "The Essentials of Finance and Accounting for Non-Financial Managers" – Edward Fields - "Accounting Made Simple" – Mike Piper - "Corporate Finance" – Aswath Damodaran (beginner level) - Tasks: - Learn to read Income Statement, Balance Sheet, Cash Flow - Understand financial ratios and their meanings - Learn corporate finance basics: TVM, cost of capital, capital structure

Month 3-4: Excel & Financial Modeling - Books/Resources: - "Financial Modeling" – Simon Benninga - Wall Street Prep / Breaking into Wall Street online modules - Tasks: - Master Excel formulas, pivot tables, and charts - Build 3-statement financial models - Practice scenario analysis, sensitivity analysis, forecasting

Month 5-6: Valuation & M&A Basics - Books: - "Investment Banking: Valuation, Leveraged Buyouts, and Mergers & Acquisitions" – Rosenbaum & Pearl - "Damodaran on Valuation" – Aswath Damodaran - Tasks: - Learn DCF, Comparable Company Analysis, Precedent Transactions - Understand M&A processes, deal structures, and LBO basics - Practice case studies

Month 7-8: Markets & Investment Products - Books: - "The Intelligent Investor" – Benjamin Graham - "A Random Walk Down Wall Street" – Burton G. Malkiel - "Options, Futures, and Other Derivatives" – John C. Hull - Tasks: - Learn equity, debt, derivatives, IPOs, bonds - Track financial news daily (Bloomberg, WSJ, Financial Times) - Understand macroeconomics basics and market trends

Month 9-10: Technical Skills (Python & SQL for Finance) - Books/Resources: - "Python for Finance" – Yves Hilpisch - SQL tutorials: W3Schools or Mode Analytics - Tasks: - Use Python for data analysis, modeling, automation - Use SQL for extracting and analyzing financial datasets - Build mini projects: stock analysis, dashboards

Month 11-12: Practical Experience & Networking - Books: - "Investment Banking Workbook" – Rosenbaum & Pearl - "The Investment Banking Guide" – William H. Hutt - Tasks: - Build portfolio of models and case studies - Apply for internships or virtual IB programs - Network with alumni, LinkedIn, and finance communities - Optional: Start CFA Level 1 prep

Key Tips for CS Graduates: 1. Leverage quantitative skills for financial modeling, quant analysis, fintech roles. 2. Focus on hands-on practice: models, pitch books, valuations. 3. Network extensively; IB relies heavily on relationships. 4. Consider CFA or FRM for credibility if not pursuing an MBA.