

WILLIAM WALZ

San Francisco Bay Area | Claremont, CA
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EDUCATION

Pomona College - Claremont, California

Bachelor of Arts in Economics & Mathematics

Aug 2024 – May 2028

- Grades/Test Scores: 4.00/4.00 GPA (Major GPA) | 3.96/4.00 GPA (Cumulative GPA)
- Relevant Coursework: Macroeconomic Theory, Economic Statistics, Multivariable Calculus, Linear Algebra, Data Science in R. Upcoming: Portfolio Theory, Machine Learning in Asset Pricing, Microeconomic Theory, Probability
- Activities/Clubs: Claremont Investment Banking Club, The Student Life Newspaper, Biotrade Club

EXPERIENCE

BK Capital Management - New York, New York

May 2025 – Present

Junior Analyst, Active Assets (Quantitative & Fundamental)

- Analyzed NVIDIA's valuation surge using logistic and OLS models, identifying a post-2022 shift toward sentiment-driven performance explaining up to 59% of short-term return variation.
- Built a quantitative framework combining fundamental, technical (RSI), and event-driven (EPS surprise) indicators to evaluate both non-fundamental and sentiment-based drivers of price movement.
- Expanding on the Mean-Event-Conditional Dispersion (MECD) Frontier to refine its risk modeling applications and integrate it into our team's flagship FRISPe strategy.

Sagehen Capital Management - Claremont, California

Oct 2025 – Present

Investment Analyst (TMT Group)

- Research and pitch investment opportunities for Sagehen Capital's \$1M student-managed portfolio, analyzing company fundamentals, market trends, and industry dynamics using Capital IQ and financial statement data.
- Perform valuation and accounting-based financial analysis, including DCF, comparable company, and precedent transaction methods, to support portfolio recommendations and group discussions.

Hakimo AI - Menlo Park, California

Jun 2025 – Aug 2025

Business Analytics Intern

- Combined data sources into a unified system that streamlined reporting and elevated operational efficiency by 30%.
- Developed an interactive dashboard to visualize 10+ KPIs and track ARR across 200+ customer sites, improving data consolidation and portfolio value.
- Performed time-series correlation analyses to quantify ARR impact of hardware deployments and reveal timing patterns between operations and revenue growth.

ACTIVITIES AND LEADERSHIP EXPERIENCE

NCAA Division III Swim & Dive - Pomona College

Aug 2024 – Present

SCIAC Scoring Team Member

- Represent and score for the Pomona-Pitzer Men's Swimming and Diving team at the Southern California Intercollegiate Athletic Conference.
- Part of the Spring 2025 CSCAA Scholar All-America Team, recognizing academic and athletic excellence.

EconLLM Research Lab - Claremont Graduate University

Aug 2025 – Present

Head Student Researcher

- Spearheading design of a Bayesian-informed model and experimental study on how AI-generated financial advice influences portfolio strategy.
- Leading a small research team in developing the study's framework, data collection process, and behavioral analysis methods.

SKILLS & INTERESTS

- **Languages:** English (Native), Mandarin (Intermediate)
- **Technical:** R (dplyr, ggplot), SQL Basics, Stata, Git/GitHub, Capital IQ, Equity Valuation, Financial Modeling, Microsoft Office Suite, Google Office Suite
- **Interests:** Travel, Cooking, Open Water Swimming, Triathlon, Pickleball, Badminton, Volleyball, Hiking, Poker