

Ava Chen

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SUMMARY

Results-driven Investment Analyst with over 5 years of experience in financial modeling, portfolio analysis, and market research. Proven track record of increasing portfolio performance by 20% through strategic investment recommendations and data-driven insights.

EXPERIENCE

Investment Analyst

Jan 2022 - Present

Global Investments LLC, San Francisco, CA

- Conducted in-depth financial modeling and valuation analysis resulting in a 15% increase in investment recommendations accuracy.
- Developed and maintained comprehensive dashboards that tracked portfolio performance, leading to a 10% reduction in reporting time.
- Collaborated with senior management to strategize asset allocation, achieving a 25% growth in key client portfolios.

Junior Investment Analyst

Jun 2018 - Dec 2021

Capital Advisors Group, Los Angeles, CA

- Supported the investment team with market research and financial analysis, contributing to a 30% increase in successful investment pitches.
- Utilized Bloomberg Terminal and Excel for data analysis, enhancing decision-making processes.
- Assisted in the preparation of quarterly investment reports that led to improved client satisfaction scores by 15%.

Financial Analyst Intern

Jan 2017 - May 2018

Investment Solutions Inc., Los Angeles, CA

- Analyzed financial statements and assisted in the preparation of reports, resulting in a 5% increase in operational efficiency.
- Participated in the evaluation of investment opportunities, providing insights that led to a successful acquisition valued at \$2M.

EDUCATION

Bachelor of Science in Finance

May 2018

University of California, Berkeley, Berkeley, CA • GPA: 3.7

SKILLS

Technical Skills: Financial Modeling, Valuation Analysis, Market Research, Data Analysis

Tools & Frameworks: Bloomberg Terminal, Excel, Python, Power BI