Brendan M. Erhard

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Project portfolio: https://bme3412.github.io/html/work.html || GitHub: https://github.com/bme3412

Experience

11/15 – *Present* **Columbia Threadneedle Investments** – *Portfolio Analyst, Global Technology Growth Fund*   **Boston, MA**

- Analyst on the Global Technology Growth Fund (CMTFX) strategy, AUM $3.7 bn; winner of Lipper award for top performing fund for trailing three, five, and ten-year periods within the science and technology fund category; the fund seeks long-term capital appreciation and has generated average annual returns of 30% over the past 5 years
  - Responsible for ongoing company-specific research, idea generation, and implementation of investment ideas across all market capitalizations, sectors, and geographies within the global technology landscape
  - Perform thorough fundamental analysis of each company's business model and financial position to assess the sustainability of its competitive advantage and potential for sustained capital return appreciation
  - Build and maintain financial models with Microsoft Excel to size addressable markets and potential growth opportunities, as well as to estimate future earnings and cash flow generation, in order to estimate intrinsic value of underlying securities
  - Use Python programming language to integrate company-specific Microsoft Excel financial models to form interactive sector analysis, valuation stress-testing, and industry demand models and for dynamic quantitative screening
  - Improve and evolve the team's research process using Python programming for data capture, analysis, and collaboration
  - Interact with industry participants through meetings with management teams, analyst calls and industry events, including investor conferences and internally hosted non-deal roadshows
  - Regularly attend IPO investor meetings for companies coming to market, and facilitate with capital markets teams to analyze the attractiveness of new stock issuances
  - Initiate and maintain written and verbal communications with Senior Portfolio Manager, focusing on the critical variables driving an investment thesis, supported with creative use of Python to provide compelling data-supported conclusions
  - Strategy assets under management have increased from $500m to $3.7bn over past five years

3/11 – 11/15 **Columbia Threadneedle Investments** – *Portfolio Analyst, Large Cap Equity*   **Boston, MA**

- The junior member of the Select Large Cap Equity (NSEPX), Dividend Income (LSBAX), and Global Infrastructure (CRIZX) fund strategies (77 accounts, total AUM ~$15.0 billion); responsible for implementation of investment decisions, portfolio analysis, and company-specific and sector research
  - Interfaced with research analysts, traders, and portfolio managers to analyze and implement investment decisions
  - Collaborated with senior portfolio managers and trading desk to develop trading and execution strategies to ensure alignment with investment mandate and strategies
  - Directed all tasks related to fund participation in IPOs, MLPs, and derivatives using the Longview Trading Platform
  - Performed portfolio attribution, risk analysis, and position monitoring on an ongoing basis
  - Completed research and produced reporting materials for external clients and internal partners related to the establishment of the multi-asset Global Infrastructure fund
  - Created proprietary quantitative screens to generate investment ideas from a universe of 1,200+ equity securities
  - Gathered and analyzed large datasets needed to support portfolio decisions and communicated findings to senior portfolio managers and analysts

9/19 – *present* **Data Science Projects** – *python enthusiast*   https://bme3412.github.io/html/work.html   **Boston, MA**

- "NBA Fanatic": used python to web-scrape box-score data for 1,447 unique players and 24,600 regular season games to find the top 25 players over the past 20 years https://bme3412.github.io/html/project3.html
- "Top 5 Airbnb units in Paris": used python/pandas to scrape 50,133 Airbnb listings, and scikit-learn/regression techniques to identify the top 5 Airbnb rentals in Paris, France. https://bme3412.github.io/html/airbnb/airbnb.html
- "Becoming Pythonic": used object-oriented file system paths and functional programming to quantify the # of python files I created from September 2019 to September 2021 – 849 files total https://bme3412.github.io/html/project1.html

Education

9/06 – 5/10 **Boston College** – *College of Arts and Sciences*   **Chestnut Hill, MA**

- Bachelor of Arts in International Studies with a concentration in Economics
  - GPA: 3.55/4.00; participated in semester-long study abroad program at Institut d'Etudes Politiques de Paris in Paris, France

Skills and Extracurricular

- High school class valedictorian (class size: 405); Boy Scouts of America: Eagle Scout Award (100+ hour service project)
- Technology skills: Microsoft Office, Bloomberg (BQNT and BQL); Python (pandas, matplotlib/seaborn, numpy, scikit-learn, bokeh); Blackrock Aladdin, Longview Trading System; web scraping