

JEFF GUO

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EDUCATION

New York University

New York, NY

Bachelor of Arts in Economics, Joint minor in Computer Science and Mathematics

May 2021

- **GPA:** 3.7/4.0, awarded Dean's honors list (2019, 2020) for outstanding academic performance
- **Relevant Courses:** Mathematics for Economics, Econometrics, Data Science, Data Structure, Statistics, Money and Banking, Microeconomics and Macroeconomics

PROFESSIONAL WORK EXPERIENCE

Valuation Research Corporation

New York, NY

Portfolio Valuation Analyst

June 2022 – February 2024

- Constructed and maintained over 100 Excel based financial models to perform valuation using discounted cash flow, public market comparable, and yield build-up Methodologies
- Conducted in-depth fundamental research on Technology and Consumer companies; analyzed revenue drivers, total addressable markets (TAM), leverage profile, and management projections
- Performed valuation analysis of various investment securities (inc. senior term loan, 2nd lien term loan, preferred equity, convertible note) for institutional clients including private credit, business development company (BDC), private equity, venture capital, and hedge funds
- Evaluated financial statements and credit agreements, and conducted due diligence calls to evaluate quarterly fundamental performance including EBITDA margin, retention rates, debt to EBITDA, budget projections, demand/supply mechanics, industry trends and growth drivers
- Examined and concluded valuation assessments by utilizing fundamental metrics (inc. loan to value ratio, leverage ratio, cash interest coverage) and market metrics (inc. industry and loan comparable spread changes)

American Environmental Energy

New York, NY

Investment Analyst

June 2021 – June 2022

- Conducted fundamental research on the Electric Vehicle (EV) charger industry including industry potential, primary products, key competitors, government subsidy policy, and supply chain readiness
- Initiated a strategic green finance project with an EV charger supplier and analyzed the company's competitive positioning within the industry as well as its financial performance
- Proposed a quantitative framework to understand ESG equity market by examining multiple environmental parameters, aiming to launch a live index futures to track the performance of selected ESG market participants
- Investigated the potential trading opportunities for a diversified commodity portfolio, including WTI crude oil and CME corn futures, according to fundamental (inc. inventory levels and weather data) and technical (inc. moving average, support/resistant levels) indicators

Detecon Consulting

Beijing, CN

Project Research Intern

May 2020 – Aug 2020

- Independently completed market research in the Technology and Consumer sectors; analyzed market sizing, major competitors, regulatory compliance, cash burn rate, and digital transformation trends to provide industry insights and identify potential investment opportunities for clients
- Led due diligence efforts on 2 Healthcare startups (inc. Telehealth platform and Healthcare SaaS software) through data analysis in Excel, expert calls, and interviews to examine technology innovations, churn rates, patient engagement metrics, and visit volumes

SKILLS AND INTERESTS

- **Skills:** Financial Modeling, Capital IQ, Loan Connector, Microsoft Office, VBA, SQL, Python (intermediate)
- **Languages:** native in English and Chinese
- **Interests:** Aquarium design (Fish tank landscaping), Competitive table tennis (1st place in middle school), Reading (Investment articles), Stock investing, Global volunteering (Nepal), Puzzling