

Shradha Shrestha

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EDUCATION

Passed Level I of the CFA examination

Master of Investment Management & Financial Analysis (May 2015)

GPA: 3.9

Creighton University, Omaha, NE

Bachelor of Arts in Economics & Business Administration (January 2012)

GPA: 3.5

Randolph College, Lynchburg, VA

EXPERIENCE

Equity Research Associate (July 2015 – Present)

Principal Global Investors - Equities, 801 Grand Avenue, Des Moines, IA 50309

** A boutique of Principal Financial Group, Principal Global Investors – Equities – is an investment management group with approximately \$70 billion in AUM.*

- Issue investment recommendations utilizing a fundamental approach in the financials, REIT, energy, and other sectors
- Develop financial models to accurately reflect and project companies revenues, cash flow potential, and valuations
- Interact with sell-side analysts, IR personnel, and senior management of companies to develop investment theses
- Communicate the recommendations and other relevant information with senior analysts and portfolio managers
- Support portfolio managers globally by reviewing multi-currency cash positions daily for appropriate levels, reporting liquidity needs, preparing and inputting trade orders, and monitoring account restrictions and investment guidelines
- Liaise internally with operations and fund accounting teams to respond to client inquiries and requests for information

Investments Intern (September 2014 – May 2015)

Boys Town Endowment Fund, 14100 Crawford Street, Boys Town, NE 68010

** Boys Town is a non-profit organization that supports at-risk children. Its endowment fund has approximately \$2 billion in AUM and invests in vehicles such as private equity, hedge fund, mutual fund, REIT, et cetera.*

- Researched and compiled net mineral acreage and related revenues associated with mineral rights transactions
- Analyzed optimal cash balances reserved for unfunded private equity commitments
- Monitored, reconciled, and tracked cash flows of portfolio investments

Graduate Assistant (September 2014 – May 2015)

Anna Tyler Waite Leadership Program, Creighton University, 2500 California Plaza, Omaha, NE 68178

- Communicated with students about assignments and course policies, and organize events for the program

Real Estate Investment Intern (May 2014 – August 2014)

Metonic Real Estate Solutions, 16910 Frances Street, Omaha, NE 68130

** Metonic is a real estate investment management company that provides acquisition, financing, asset management, and disposition services for commercial and multi-family residential properties.*

- Underwrote cash flows on potential deals ranging from \$2.9 million to \$62 million
- Executed market, economic, and demographic research for potential investment opportunities
- Forecasted and updated on-going capital needs for current projects

Economic Outlook Researcher (September 2013 – August 2014)

Creighton University, 2500 California Plaza, Omaha, NE 68178

- Assessed the impact of quantitative easing on the stock prices of agriculture-based companies

ACTIVITIES & AWARDS

- Represented Creighton University in the Economist magazine's Muddy Waters Investment Competition (November 2014)
- Analyzed equities for the \$5 million student run equity portfolio for the Creighton University Endowment Fund (July 2014 – August 2014)
- Presented and competed in the undergraduate paper competition at the 64th Annual New York State Economic Association Conference, Rochester Institute of Technology, Rochester, NY (September 2011)

SKILLS & INTERESTS

- Fluent in English, Hindi, and Nepali
- Software: FactSet, Charles River Trading System, Bloomberg, Starmine, Private i, Morningstar, Tessitura, STATA
- Membership Volunteer, Joslyn Art Museum (May 2013 – December 2014)