

Alex McShane

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EDUCATION

Temple University – Fox School of Business and Management

Philadelphia, PA

Bachelor of Business Administration

Expected Graduation: May 2025

- **Major:** Management Information Systems and Finance | **GPA:** 4.0
- **Honors:** MIS Academic Achievement Award; Founders Scholarship; FSBM Scholarship; IT Leader Scholarship
- **Relevant Coursework:** Financial Management; Financial Accounting; Managerial Accounting; Web Application Development; Data Analytics; Microeconomics; Macroeconomics; Marketing Management
- **Organizations:** Association for Information Systems; Temple Finance Association; Temple Newman Center

WORK EXPERIENCE & ACTIVITIES

William C. Dunkelberg Owl Fund

Philadelphia, PA

Associate Analyst | Information Technology Coverage

August 2022 – Present

- Present two buy-recommendations to the student-managed value fund in an initiating coverage report format containing a Company's industry overview, catalysts, undervaluation, risks, and peer group analysis
- Utilize industry software tools like Bloomberg, FactSet, and CapIQ to perform company- and industry-wide fundamental research that informs investment decisions aiming for long-term capital generation
- Utilize historical and comparable company data to build a DCF model and generate a 52-week price target
- Create sector outlook reports identifying possible areas of investment opportunity for a 12-18 month horizon
- Work with a team to monitor holdings and advise the fund on weightings and sell recommendations

Optimize Consulting Group

Philadelphia, PA

Associate Consultant

January 2022 – Present

- Analyze technological capabilities of Philadelphia-based non-profits and recommend process improvements to enable the client organization to streamline and expand current operational capabilities
- Aid in the implementation of various software tools geared towards optimizing the end-to-end user-experience
- Create and present deliverables aligned with client expectations that detail progress and success in the project

Long Short Advisors

Philadelphia, PA

Research Intern

May 2022 – September 2022

- Performed qualitative and quantitative analysis on bonds, equities, interest rates, and economic data to write a nine-part newsletter detailing how current market events could impact the Company's mutual fund strategy
- Leveraged CRM software to track newsletter recipients' engagement data to build a sales pipeline targeting the most interested investors, resulting in twelve investor introduction meetings
- Conducted quantitative analysis on alternative assets and created factsheets weighing their viability in a portfolio
- Coordinated with two other interns to share performance updates and ensure completion of assigned tasks

MS Cubed Consulting LLC

Phoenixville, PA

Data Intern

May 2021 – August 2021

- Developed consistent invoicing, contracting, and SOW archiving procedures for six subcontractors on behalf of boutique information technology-focused human resource management company
- Aided in interview and new hire onboarding process of job candidates for various positions
- Supported talent acquisition by posting job descriptions and reviewing candidate credentials

Atlantic Community Thrift Shop

Millville, DE

Volunteer

June 2015 – August 2021

- Aided in the operations of a non-profit thrift store that donates nearly \$200K back to the community annually
- Improved the collection, sorting, and pricing process to facilitate a 33% increase in product turnover
- Communicated directly with community members about donation policies, arranged for the orderly acquisition of donations, and directed traffic within the store's vicinity to ensure safety in the parking lot

SKILLS & INTERESTS

Technical Skills: Bloomberg, FactSet, CapIQ, Excel, PowerPoint, Word, MySQL, MongoDB, JavaScript, HTML5

Volunteering: St. Basil's the Great Parish, St. John's Hospice

Interests: American Literature, Artificial Intelligence, Boating, Hiking, History, Mountain Biking, Travelling