

# James Fitzgerald

## GRADUATE INVESTMENT ANALYST



### CONTACT

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### PROFILE

Economics and finance graduate from the University of Bristol with experience in equity research and portfolio analysis. Completed a **10-week summer internship** at Schroders in the UK equities team, contributing to research on **8 FTSE 250 companies**. Strong financial modelling skills in Excel and Bloomberg Terminal proficiency.

### EXPERIENCE

Jun 2024 – Aug 2024

#### Summer Analyst (UK Equities), Schroders plc, London

Joined the UK equities desk as part of Schroders' summer analyst programme.

- Produced equity research notes on **8 FTSE 250 companies** across industrials and consumer sectors
- Built discounted cash flow models for **3 potential investments** with enterprise values between £400 million and £2.1 billion
- Monitored a watchlist of **25 stocks** daily, preparing morning briefing summaries for the portfolio manager
- Presented a **buy recommendation** on a mid-cap industrial stock to 12 investment professionals at the end-of-programme review

Sep 2023 – May 2024

#### Student Brand Ambassador, Bloomberg LP, Bristol

Promoted Bloomberg Terminal access and financial data literacy on campus.

- Organised **6 Bloomberg Terminal workshops** for finance students, with an average attendance of **20 per session**
- Increased terminal usage in the finance lab by **35%** over the academic year

### EDUCATION

Sep 2022 – Jul 2025

#### BSc (Hons) Economics and Finance in Economics and Finance, University of Bristol, Bristol

First Class (72%). Dissertation on momentum strategies in UK small-cap equities using 10 years of LSE data. Modules included Corporate Finance, Portfolio Theory, and Financial Econometrics.

### SKILLS

Equity Research • DCF Modelling • Bloomberg Terminal • Financial Statement Analysis • Excel (Advanced) • Portfolio Analysis • Presentation Skills • Sector Analysis

### CERTIFICATIONS

Jun 2025

#### IMC (Investment Management Certificate), CFA Society UK

### LANGUAGES

English - Native • French - Intermediate

### PROJECTS

Sep 2023 – Jun 2025

#### University Investment Fund

Member of the student-managed investment fund with **£30,000 AUM**. Managed the consumer discretionary allocation, which returned **9.2%** over 12 months versus the benchmark's 6.8%.

### EXTRA CURRICULAR ACTIVITY

Sep 2022 – Jun 2025

#### Bristol Finance and Investment Society

Vice-president in final year. Organised the annual stock-pitch competition with **50 participants** and **3 sponsor firms**.