

Brandon Leon

Anaheim Hills, CA 92808

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(714) 270-9591

EDUCATION

California State University - Fullerton

Fullerton, CA

MBA in Finance

May 2023

- GPA: 3.73/4.0; Major GPA: 3.85/4.0

University Of California - Irvine

Irvine, CA

B.A. Sociology, Minor in Statistics

June 2019

- GPA: 3.65

WORK EXPERIENCE

El Toro Capital Management (*tech-focused growth equity*)

Santa Monica, CA

Private Equity Intern-Analyst – Cybersecurity, Digital Media & Software Coverage

October 2022 – Present

- Worked in small deal teams to assist in Growth Buyouts and Growth Equity Investments in profitable private Digital Media, Software as a Service, and Cybersecurity.
- Evaluated over 3,000 potential acquisition targets; contacted attractive targets via email to initiate dialogue
- Workstreams include: drafting marketing materials (teaser & management presentation), company and management outreach, due diligence, competitive analysis, industry and company research

Selected Transaction Experience:

- Collaborated with seniors and other interns on the due diligence process, leading to the submission of an IOI
- Participated in calls and attended conferences with company management to take notes and find potential prospects
- Developed relative valuation models based on comparable public companies and precedent transactions

New Century Capital Partners (sell-side Investment Bank)

Santa Monica, CA

Investment Banking Intern-Analyst – Cybersecurity, Digital Media & Software Coverage

October 2022 - May 2023

- Continue to develop relationships with new and existing clients to help grow business,
- Performed due diligence of management teams, buyers, sellers and any other parties involved in the transaction
- Performed extensive and directed industry and market research to support existing transactions for management

EXTRACURRICULAR EXPERIENCE

Titan Capital Management (*Student Managed Investment Fund*)

Fullerton, CA

Investment Analyst – Industrials, Materials, Energy & Communication Services Coverage

May 2022 - May 2023

- Assist in developing and maintaining the fund's investment portfolio, responsibilities include:
 - Identify investment opportunities and perform valuation analysis (DCF, Public Comps, Precedent Transactions)
 - Compose detailed research reports to initiate positions in attractive securities and divest from less favorable ones
 - Track macro-economic indicators and industry trends as well as their impact on the portfolio
- Deliver regular performance attribution reports to the program's advisory board and clients

Portfolio Manager – All-Weather/Asset Allocation

- Constructed a portfolio of \$1M from the ground up emphasizing risk limitation and diversification to mitigate drawdowns in any economic climate; continuous tracking of macro-economic indicators to safeguard portfolio performance
- Trade ETFs, Mutual funds, futures, commodities, cryptocurrencies, equities, and bonds
- Deliver regular performance attribution reports to the program's advisory board and clients

CFA Investment Research Challenge - LA (*1st Place*), Regional (*1st Place*), Americas (*Winner*) *Oct 2022 - May 2023*

- In a team with three other students, reached the Global Finals in an equity Investment Research Challenge for the CFA
- Compiled a 20-page industry research report and a 10-minute in-person and online presentation on Chipotle
- Pitch to the CFA judge panel; present analysis, findings, recommendations, and manage Q&A
- Hands-on mentoring and intensive training in financial analysis, presentation skills, and professional ethics

CREDENTIALS / SKILLS / INTERESTS

Computer: Expert in Excel, PowerPoint, Capital IQ, Bloomberg, FactSet

Certifications: Breaking into Wall Street: Excel & VBA Certificate

Wall Street Prep's Financial Statement and DCF Modeling

FactSet Essentials: Core Products

Bloomberg Market Concepts Certificate

Interests: Sports, reading, outdoor activities