

Brandon Leon

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EDUCATION

Cal State Fullerton | College of Business and Economics

Master of Business Administration in Finance

Fullerton, CA

June 2023

University of California, Irvine

Bachelor of Arts in Sociology, Minor in Statistics

Irvine, CA

June 2019

PROFESSIONAL EXPERIENCE

El Toro Capital Management (Tech-focused Growth Equity)

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

Santa Monica, CA

October 2022 – August 2023

- Led and worked in small deal teams to assist in Growth Buyouts and Growth Equity Investments
- Evaluated over 3,000 potential acquisition targets; contacted attractive targets via email to initiate dialogue
- Workstreams included: Drafting marketing materials (teaser and management presentation), company and management outreach, due diligence, competitive and precedent transaction analysis, industry and company research
- Selected Transaction Experience:
 - Pending acquisition of Identity and Access Management (IAM) company
 - Collaborated with senior management and others on the due diligence process, participated in company calls and built relative models leading to the submission of an Interest and Letter of Intent
 - Pending acquisition of Digital Media (DM) company
 - Helped lead a team of interns with senior management to help source, conduct due diligence, participate in company calls, build relative and precedent transaction analysis models which led to a submission of IOI

New Century Capital Partners (Sell-Side Investment Bank)

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

Santa Monica, CA

October 2022 – June 2023

- Helped lead and worked in small deal teams to assist in M&A and capital raising
- Updated internal databases daily with client, company and transaction information
- Drafted Cybersecurity Thought Pieces and White Papers
- Selected Transaction Experience:
 - Sell-side advisor to a professional services provider and integrator for ERP software
 - Helped team perform due diligence and extensive industry research which made the company viable; resulted in company proceeding with the project and ultimately selling the company.

EXTRACURRICULAR & LEADERSHIP EXPERIENCE

Titan Capital Management (TCM)

Portfolio Manager, TCM Asset Allocation Portfolio

Fullerton, CA

May 2022 – June 2023

- Constructed and actively managed the TCM Asset Allocation Portfolio, a balanced portfolio with ~\$1mm market value
- Implemented a risk-controlled investment strategy using a blend of less-correlated asset classes to generate lower volatility than the U.S. stock market across a variety of economic conditions
- Identified attractive opportunities and performed valuation analysis (DCF, Public Comps, Precedent Transaction)
- Composed detailed research reports to initiate positions in attractive securities and divest from less favorable ones
- Delivered regular performance attribution reports monthly to the program advisory board and clients

Investment Analyst, CFA Institute Research Challenge (IRC) Participant

June 2022 – June 2023

- Competed in CFA Investment Research Competition against more than 6300 students from 1100 universities globally
 - Won the CFA Local, Sub-regional, and Regional rounds with a twenty-page written investment research report and ten-minute stock pitch; One of six schools to advance to the Global finals to represent the Americas region
 - Pitched to a panel of CFA judges, presented analysis, findings recommendations and managed Q&A
 - Hands-on mentoring and intensive training in financial analysis, presentation skills and professional ethics

SKILLS & CERTIFICATES

Skills: Financial Modeling, Financial Statement Analysis, Microsoft Office, FactSet, Bloomberg Terminal, Capital IQ, Fundamental Analysis, Research and Performance Reporting, Strong Oral and Written Communication

Certifications: Wall Street Prep's Financial Statement and DCF Modeling, Series Industry Essentials (SIE), Bloomberg Market Concepts (BMC), FactSet Essentials: Core Products, Breaking Into Wall Street: Excel, VBA & Financial Modeling

Certification(s) in Progress: Chartered Financial Analyst (CFA) Level 1 - May 2024