

James Hudson

PORTFOLIO ANALYST

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Manhattan, New York 📍

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Motivated individual with 8 years of global-driven Financial Analyst skilled in collecting, monitoring and studying data to analyze financial status and recommend the business strategy. Experienced in qualitative and quantitative analysis, contract management and forecasting. Good presentation, relationship-building, and organizational skills.

Skills

- Financial Statements Analysis
- Monitor Portfolio Performance
- Portfolio Management Strategies
- Advanced Excel
- Strong Interpersonal Skills
- Data Analysts
- Powerpoint
- Provided Reports to Stakeholders

Experience

Sr. Portfolio Analyst

JP Morgan Investments, NY *May 2019 - Present*

- Research Global and Domestic Capital Market Indices and Updates;
- Research Asset Classes and Identify Emerging Trends of Investing for the Ultra High Net worth Individuals;
- Research and Understand Ultra High Net worth Decision Process of Investing;
- Use research tools for adequate output of Key Ratio's of Portfolio to evaluate performances;
- Make Pitch Books (Power Point Presentation) for Client Acquisitions;
- Track Portfolio Reports regularly

Portfolio Analyst

Bank of America, NY *Apr 2018 - Jun 2018*

- Understanding the products and services offered under transaction banking;
- Worked with the Forex department to learn about Forex products and their processing;
- Conducted Client Visits to ensure if, satisfied with the products and services

Education

Master's Degree in Business Administration

Columbia University, New York *Jul 2017 - Apr 2019*

Bachelor of Business Administration

Arizona State University, Arizona *Jul 2013 - May 2016*

Projects

Client Portfolio Management

Project Manager

The Case of BTM Two Wheeler manufacturer

- Used project management principles such as calculating critical path for the activities in use and building a project cost expense model.
- Analyzing the project viability, by calculating the cost of equity using CAPM model, Project and equity IRR, NPV of the project and equity and calculating the WACC for the project.

Certification

Financial Planning and Wealth Management

University of Delaware

Portfolio Management

Pace University