

# ALEXANDER PAN

13512 FLOWERFIELD DR ■ POTOMAC MD 20854  
(240) 688 1188 ■ ALEXPAN@UMD.EDU

## EDUCATION

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### UNIVERSITY OF MARYLAND, College Park MD

- Robert H. Smith School of Business
- Bachelor of Science, Finance Expected May 2010  
Minor in Chinese Language  
*Cumulative GPA: 3.896/4.000*
- Phi Beta Kappa  
*Honors society for top one percent of graduating class*

## WORK EXPERIENCE

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### LEMMA SENBET FUND, College Park MD

*Equity Analyst, Financials Sector*

May 2009 – Present

- Collaborate with a competitively selected team of twelve students to make investment decisions for the \$500,000 Smith School undergraduate student run endowment fund
- Pitch investment proposals supported by qualitative and quantitative research reports backed by discounted cash flow models with sensitivity analysis and multiples valuation
- Provide weekly analysis on developments in the banking and insurance sector and fund specific holdings

### THOMSON REUTERS, New York NY

*Markets Division, Focus Group Accounts Intern*

June 2009 – August 2009

- Worked closely with three sales and trading account teams in evaluating client risks and opportunities to provide on-site customized workflow solutions for Reuters 3000 Xtra
- Lead presentation on the precious metals markets to the internal commodities & energy interest group
- Involved in the planning and operation of project enhancing accuracy of Siebel CRM database
- Achievement of the internal Global Certification Programme (GCP) exam in equities

### ROBERT H. SMITH SCHOOL OF BUSINESS, College Park MD

*Assistant Manager of the Netcentric Financial Markets Lab*

August 2009 – Present

- Supervise on-going lab schedule, intern rotation and duties, and appointment requests
- Support director of technology in the implementation and maintenance of lab software and hardware

### MONTGOMERY INVESTMENT MANAGEMENT INC, Bethesda MD

*Portfolio Analytics Intern*

February 2008 – August 2008

- Analyzed trends in the firm's composite portfolio relative to major equity indices in creating customized reports highlighting strengths in the firm's historical performance
- Built periodic and ad-hoc composite and individual portfolio performance analytical reports to streamline operational tasks for portfolio managers
- Compiled monthly and quarterly portfolio returns, assets, tax status and multiples data via Advent Axys, used for updating five third party investment performance databases

## ACTIVITIES

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- Senior writer for the Finance, Banking and Investment Society's *Maryland Financial Weekly*
- Quantitative Finance Fellows Program
- Intramural Flag Football, Volleyball

## SKILLS

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- Proficient in MS Word, Excel, PowerPoint; Advent Axys Platform; Minitab
- Certified in Reuters 3000 Xtra (Kobra and PPPPro), Bloomberg, Thomson One
- Proficient in Chinese (Mandarin)