

# BOBBE POTH

Equity Research Analyst

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## PROFILE

Equity Research Analyst with 1 year of experience in providing insightful and data-driven investment recommendations. Proficient in financial modeling, valuation techniques, and industry analysis. Adept at conducting company and market research to support investment decision-making. Demonstrated ability to work effectively in fast-paced environments and strong communication skills for presenting research findings to internal and external stakeholders. Committed to continuously enhancing financial knowledge and staying updated on market trends.

## LINKS

[linkedin.com/in/bobbepoth](https://www.linkedin.com/in/bobbepoth)

## SKILLS

Financial Modeling

Valuation Techniques

Bloomberg Terminal

Data Analysis

Report Writing

Industry Knowledge

Presentation Skills

## LANGUAGES

English

German

## EMPLOYMENT HISTORY

### Equity Research Analyst at Janney Montgomery Scott, PA

Feb 2023 - Present

- Successfully identified and recommended over 50 high-potential stocks, resulting in an average return of 15% for the firm's clients within a one-year period.
- Conducted comprehensive financial analysis on over 100 companies, which contributed to the development of 20 detailed research reports that were widely recognized by institutional investors.
- Collaborated with the sales team to secure 10 new institutional clients, representing over \$150 million in assets under management for Janney Montgomery Scott, PA.
- Developed and maintained a proprietary financial model that accurately forecasted revenue and earnings for over 200 companies in the firm's coverage universe, leading to a 25% improvement in the accuracy of stock price target predictions.

### Associate Equity Research Analyst at Vanguard Group, PA

Jul 2022 - Jan 2023

- Successfully identified and recommended 10 undervalued stocks, resulting in a 15% average return for the firm's equity portfolios and outperforming the benchmark index by 5%.
- Conducted comprehensive financial analysis on over 50 companies across various sectors, leading to the creation of detailed research reports that contributed to the firm's investment decisions and generated a 12% increase in assets under management.
- Streamlined the research process by implementing new data analysis tools and techniques, reducing the time spent on report generation by 25% and increasing overall team productivity.

## EDUCATION

### Master of Business Administration in Finance at Wharton School of the University of Pennsylvania, Philadelphia, PA

Aug 2017 - May 2022

Relevant Coursework: Financial Management, Investment Analysis, Corporate Finance, Financial Markets, Portfolio Management, Risk Management, Financial Reporting, and Financial Modeling.

## CERTIFICATES

### Chartered Financial Analyst (CFA)

Dec 2021

### Certified Equity Research Professional (CERP)

Apr 2020