

Investment Portfolio Analyst

David Carter

Professional summary

Experienced Investment Portfolio Analyst with a background in managing diversified portfolios for high-net-worth individuals and institutional clients. Proficient in asset allocation, risk management, and performance evaluation. Seeking to contribute skills in portfolio construction and financial analysis at a leading wealth management firm.

Experience

Investment Portfolio Analyst

January 2021 - Now

Northern Trust / Chicago, IL

- Manage a portfolio of \$1.2 billion for institutional clients, focusing on fixed income, equities, and alternative investments.
- Conduct performance attribution analysis to assess portfolio returns and identify areas for improvement.
- Collaborate with portfolio managers to develop asset allocation strategies based on client risk tolerance and investment objectives.
- Regularly present portfolio updates to clients, providing insights into market trends and performance.

Associate Investment Analyst

July 2018 - December 2020

BlackRock / Chicago, IL

- Conducted asset allocation analysis for a diverse range of client portfolios, including retirement funds, endowments, and foundations.
- Performed due diligence on potential investments, evaluating asset classes, performance history, and market conditions.
- Assisted in the development of quarterly investment reports and client-facing presentations.

Volunteer Experience

Financial Literacy Volunteer

February 2019 - Now

Junior Achievement of Chicago – Chicago, IL

- Lead workshops on financial literacy and basic investing principles for high school students in underserved communities.
- Develop educational materials and resources to help students understand budgeting, investing, and economic concepts.

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Links

LinkedIn: /in/davidcarter


Education

Bachelor of Science in Finance


University of Chicago, IL

Graduated: June 2018

Skills

Portfolio Management & Construction 

Asset Allocation Strategies 

Risk Management & Analysis 

Performance Attribution 

Bloomberg Terminal, FactSet 