

Zachary Shafi

EDUCATION

Rotman School of Management and Department of Economics, University of Toronto Toronto, Ontario
Master of Financial Economics Expected June 2025

- **Academics:** cGPA 3.68/4.0, Entrance Scholarship (\$3,000)
- **Relevant Courses:** Capital Markets (A-), Econometrics (A-), Financial Economics (A-), Security Analysis & Portfolio Management (A)

Rotman School of Management, University of Toronto Toronto, Ontario
Bachelor of Commerce (Specialist in Finance and Economics; Major in Economics) Sep 2017 – Nov 2021

- **Academics:** cGPA 3.74/4.0, Dean's List x 4, Graduated with High Distinction, New College Council In-Course Scholarship (\$1,000)
- **Relevant Courses:** Advanced Corporate Finance (A), Investments (A+), Managerial Negotiations (A+), Microeconomics (A+)

INDUSTRY CERTIFICATIONS

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- Canadian Securities Institute: Canadian Securities Course 2023
 - Corporate Finance Institute: Accounting, Corporate Finance, DCF, Excel, Fixed Income, M&A 2023
 - Training the Street: DCF Modeling, Financial Accounting, Merger Modeling 2023

PROFESSIONAL EXPERIENCES

Bank of Canada Ottawa, Ontario
Master's Internship, Financial Markets – Debt Management Winter 2024

- Interviewed 11 sovereign issuers on their debt issuances policies, & wrote a 15 page report contrasting their policies to Canada's
- Built 30+ Power BI dashboards on the overall market's & dealer's tenor concentrations, time trends, & market shares in trading GoC's
- Led a 1 hour presentation & wrote an 18 page report analyzing overall market trends & dealer tenor focuses in GoC secondary markets

National Bank Independent Network Toronto, Ontario
Account Manager, Introducing Brokers Nov 2021 – May 2023

- Managed relations with 5 client firms accumulating \$10+ billion in AUA as their lead contact for service meetings & operational inquiries
- Guided client firms across security management matters such as private sales, trade allocations, distributions, and market events
- Instructed reconciliation of mutual fund, systematic plan, trading, and transfer discrepancies for client firm accounts

National Bank Financial Toronto, Ontario
Summer Analyst, Wealth Management Rotation Program Summer 2020

- Conducted equity research on rare earth producing companies for an investment advisor, with the use of Capital IQ and Excel
- Created a global indexed and currency-hedged ETF model portfolio for an investment advisor to use as the basis of client portfolios
- Wrote a personal finance article detailing why teenagers should start investing and the methods to do so (ie. account/security types)

Summer Analyst, Fixed Income Sales & Trading Summer 2019

- Analyzed trends and determined predictor variables (via time series regressions) for Japanese net purchasing of Canadian debt
- Examined team trading volumes and closing rates on client inquiries, and presented my findings to the team's managing directors
- Quantified North American political parties' macroeconomic and financial market performances for pre federal election analysis

Morningstar Toronto, Ontario
Summer Analyst, Computerized Portfolio Management Services (CPMS) Summer 2018

- Sourced, organized, & cleaned data into a data dictionary, which detailed 50+ parameters over 7600+ variables in the CPMS product
- Created a CPMS product client list, using Salesforce and Excel to match 1000+ corporate and retail accounts to a client persistent ID
- Constructed investment strategies with the CPMS product in weekly team meetings to test the product from a client perspective

EXTRACURRICULAR & ACADEMIC EXPERIENCES

Department of Economics, University of Toronto Toronto, Ontario
Teaching Assistant – International Monetary Economics Winter 2024

- Responsible for grading all course assignments and answering all discussion board questions on course materials

Master of Financial Economics Student Program Toronto, Ontario
Co-President Winter 2024

- Led interactive lectures for incoming students on networking, technical & behavioural interview questions, and stock & trade pitches
- Guided incoming students via resume reviews, touchpoint chats, and assessing their mock interviews, reports, and presentations

Master of Financial Economics Term Papers Toronto, Ontario
How Renewable Energy Transition Relates to Environmental/Economic Benefits and Economic/Geopolitical Uncertainties Summer 2024

- Estimated Canadian provinces Renewable Energy Transition (RET) & amalgamated them into one of two groups (high & low RET)
- Regressed the groups RET on their GHG emissions & real GDP, and to economic policy uncertainty & geopolitical risk indexes

The Relationship of Immigration and Unemployment Rates Across Canada's Geographical Regions Fall 2023

- Regressed Canadian regions unemployment rates on their immigration, GDP, wages, and etc., using a SUR model for the panel dataset
- Adjusted the SUR model based on stationarity, cointegration, heteroskedasticity, functional form, and influential observation tests

PERSONAL

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- **Technical Skills:** Familiar with Bloomberg Terminal Services, Capital IQ, Microsoft Excel, Morningstar CPMS, Power BI, STATA
 - **Interests:** Cooking (South and East Asian), Golf (Handicap: 9.5), Ice Hockey (Goaltender), Passionate New Jersey Devils Fan