

# Fadi Batshon

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## Education

**University of California San Diego (Rady School of Management)**

*Bachelor of Science in Business-Economics*

Minors: Technology, Innovation & Supply Chain; Finance

San Diego, CA

Expected June 2027

GPA: 3.92

## Experience

### Finance & Treasury Intern @ Commercial Bank

Nov 2025 – Jan 2026

- Automated daily liquidity and balance-sheet reporting to the Central Bank using Excel macros, saving ~2 hours of manual prep per day and ensuring zero compliance gaps across all submissions.
- Built and optimized a peer benchmarking model comparing financials across 12+ regional banks, with profitability reports and budget projections reviewed directly by the CEO and CFO.
- Supported Ernst & Young's year-end audit by reconciling deferred tax schedules and preparing supporting documentation across multiple accounts, contributing to a clean audit sign-off with zero material adjustments on first review.
- Executed live treasury trades and managed Central Bank reserve requirements across 15+ accounts and \$350M in balances, facilitating recovery on failed overnight lends and maintaining zero regulatory breaches under high-volume conditions.

### Strategy & Finance Analyst @ Birch Aquarium

Feb 2025 – Nov 2025

- Designed a driver-based cost allocation model from scratch covering \$800K+ in program spend, separating fixed and variable cost drivers to surface margin sensitivities that directly led to pricing adjustments across several program packages.
- Overhauled an invoice-to-GL attribution framework across 200+ invoices, uncovering ~\$15K in duplicate, miscoded, and unnecessary charges, with findings feeding directly into leadership's broader cost strategy and resource allocation decisions.
- Standardized reporting across 100+ programs, translating cost run-rates into unit economics that surfaced actionable pricing insights and drove the director's decisions on program cuts, repricings, and budget reallocation.

### Business Analytics Intern @ FleekHub Consultancy

Jun 2024 – Sept 2024

- Collaborated with engineers to integrate 250K+ rows of financial and sales records into SQL-driven pipelines, enabling real-time dashboards that informed leadership's product placement and dynamic inventory decisions across a live platform.
- Conducted KPI and variance analysis across revenue, cost, and customer segments for 5+ client companies using Excel, SQL, and Python, surfacing actionable trends that directly shaped client pricing, budgeting, and operational recommendations.

### Investment Banking Intern @ Bank Al Etihad

Jul 2023 – Aug 2023

- Independently built DCF, trading comparables, and precedent transaction models across M&A, equity, and debt mandates, contributing valuation and sensitivity outputs to pitch materials with 2 models advancing into live deal execution.
- Analyzed financial statements and cash-flow profiles for 15+ SME and mid-market clients using Excel and Bloomberg, supporting credit recommendations and underwriting decisions through direct client meeting exposure.
- Normalized EBITDA and net debt across 40+ public comparables, removing non-recurring items to produce clean valuation multiples and ranges that were accepted and incorporated into client pitch materials and DCF cross-checks.

## Projects

### Multi-Horizon Equity Forecasting & ML Analytics Engine

Jan 2026

- Developed a Random Forest and Ridge regression ML engine in Python, engineering 22 features across price, volatility, and macro indicators to achieve 72–85% high-conviction directional accuracy across tested stocks.
- Constructed an end-to-end automated pipeline integrating live data ingestion, hyperparameter-tuned model execution, and real-time output delivery into a dynamic Google Sheets dashboard, enabling on-demand equity forecasting for any stock.

### Corporate Valuation & Investment Screening Engine

Dec 2025

- Engineered a corporate valuation engine combining DCF, WACC, and Monte Carlo simulation across 1,000+ iterations, translating capital structure assumptions into structured risk and return profiles across downside, base, and upside scenarios.
- Designed an investment screening framework across 12+ companies and 6 sectors, applying IRR hurdles, KPI variance analysis, and scenario matrices to generate structured buy/pass recommendations and inform capital allocation decisions.

### Systematic Trading & Performance Analytics Engine

Oct 2025

- Architected a systematic trading framework integrating live market data with MA crossovers, RSI, and volatility models across 5 stocks, automating multi-asset backtesting to generate Buy/Sell/Hold signals with 70% predictive accuracy.
- Deployed an automated ETL and analytics pipeline using Google Apps Script and Python, processing 10,000+ data points per run to benchmark strategy performance and deliver structured dashboards and written reports for model refinement.

### Multi-Sector Equity Portfolio & Performance Analytics Model

Sep 2025

- Built a 14-stock, 7-sector equity portfolio model using variance-covariance matrices and mean-variance optimization, benchmarking risk-adjusted returns against the S&P 500 and lifting simulated portfolio returns by 12%.
- Applied CAPM, Jensen's Alpha, Sharpe, and Information Ratio frameworks alongside multi-factor regression signals to strengthen diversification and risk controls, generating 1.8% alpha and 18% portfolio efficiency gains.

## Skills

**Finance & Modeling:** Financial Modeling, Portfolio Optimization, Cash Flow Forecasting, Valuation Analysis, Budgeting & Variance Analysis, Financial Statement Analysis

**Data & Analytics:** Machine Learning, Predictive Modeling, Feature Engineering, Regression Analysis, KPI & Driver-Based Modeling, Scenario & Sensitivity Analysis, Data Visualization

**Tools:** Python, Microsoft Excel, SQL, Bloomberg, Google Apps Script, PowerPoint, Stata, R, Generative AI & Prompt Engineering

**Consulting:** Strategic Problem Solving, Data-Driven Decision Making, Client Communication, Cross-Functional Collaboration