JAMIE BENNINGTON

Junior Portfolio Manager

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Boston, MA

PROFESSIONAL SUMMARY

Detail-oriented Junior Portfolio Manager with 3 years of experience supporting senior portfolio managers in the analysis and management of client portfolios. Expertise in data analysis, financial modeling, and equity research. Possess a strong understanding of macroeconomic trends, corporate financials, and investment strategies.

LinkedIn: /in/jamiebennington

EDUCATION

Bachelor of Science in Economics

University of Michigan – Ann Arbor, MI

Graduated: May 2022

SKILLS

- CFA Level II Candidate (Expected Completion: June 2025) — Expert
- Proficient in Bloomberg Terminal, Excel, and Python for Financial Analysis — Expert
- Strong understanding of portfolio management, financial analysis, and risk management — Expert
- Excellent written and verbal communication skills — Expert

EXPERIENCE

2024 - Now

Junior Portfolio Manager
Fidelity Investments – Boston, MA

- Assist in managing $1.8 billion in mixed equity portfolios, focusing on growth stocks and fixed income.
- Perform in-depth analysis of individual stocks, including earnings forecasts, P/E ratios, and sector-specific factors.
- Support senior managers in asset allocation and investment decisions, ensuring optimal diversification and risk mitigation.
- Prepare investment reports and portfolio performance presentations for internal and client use.

2022 - 2024

Investment Analyst
Goldman Sachs Asset Management – New York, NY

- Conducted research on global equity markets, with a focus on emerging markets and technology stocks.
- Assisted senior analysts in preparing investment recommendations, contributing to portfolio adjustments.
- Participated in weekly strategy meetings, presenting insights on macroeconomic factors and individual stock performance.
- Developed financial models to assess the impact of potential market events on portfolio positions.

TECHNICAL PROJECTS

Portfolio Optimization Model

Developed a Python-based portfolio optimization tool using the Modern Portfolio Theory (MPT) to enhance the risk-adjusted returns of client portfolios.