### NAFTALI KRUMAN

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### **EDUCATION**

**Brandeis University** (Waltham, MA)

May 2023

Bachelor of Arts in Economics; Minors in Business and Near Eastern Judaic Studies

GPA: 3.71, magna cum laude

Relevant Coursework: Business Fundamentals, Calculus II, Econometrics, Entrepreneurship, Financial

Accounting, Financial Economics, Introduction to Python, Microeconomic Theory

Omicron Delta Epsilon, Economics Honor Society

May 2023

Michael Coiner Scholarship, Recipient

2021 - 2023

#### **EXPERIENCE**

## Sumitomo Mitsui Trust Asset Management Americas (New York, NY)

Sep. 2023 - Present

**Associate** 

- Authored monthly fund performance and weekly Japan market reports by analyzing corporate earnings, economic releases, and financial sector trends to evaluate portfolio performance and market trends.
- Prepared pitchbooks and factsheets for U.S. investors, revised content to align with securities regulations, and updated data using performance files, Bloomberg, and Japanese government statistics.
- Functioned as the client team's data analyst, creating Bloomberg- and VBA-based workflows to streamline return analyses and macroeconomic reporting.
- Managed a \$15 million Cayman fund, including documentation and workflows for onboarding and redemptions. Spearheaded financial reporting by preparing budget and expense reports for the audit.

### **U.S. Securities and Exchange Commission** (Boston, MA)

May 2022 - Aug. 2022

**Examinations Intern** 

- Collaborated with SEC Examiners at all stages to examine the activities of registered firms.
- Analyzed Form ADVs and leveraged SEC databases to determine the risks and scope of an exam.
- Reviewed firm releases and registrant documents to evaluate any potential deficiencies.
- Compiled an inventory of Form ADVs submitted from 2015 2022 for the Boston office.
- Completed a joint SEC-Georgetown Law course on modern regulatory trends and examinations.

#### Brandeis Investment Club (Waltham, MA)

Sep. 2021 - May 2023

Consumer Discretionary Goods Analyst

- Conducted market research on industry trends and drivers using IBISWorld.
- Analyzed each firm's financial information and outlook using annual statements and press releases.
- Calculated financial ratios using FactSet and valued each firm through comparable company analysis.
- Performed DCF analysis using Excel to estimate future cash flows and investment upside.
- Prepared biweekly investment summary presentations and pitched stocks to the club board.

## Brandeis Undergraduate Economics Program (Waltham, MA)

Apr. 2021 - May 2023

Undergraduate Departmental Representative

- Advised students on academic and career development and coordinated university programs.
- Collaborated with colleagues on an introductory event for prospective economics majors.
- Planned the discussion topics and moderated a networking panel with alumni.
- Coordinated an internship search workshop with the business department and career center.

#### **SKILLS**

**Programming:** Python, R, HTML, and CSS **Software:** Microsoft Excel, Bloomberg Terminal **Languages:** Hebrew - Proficient; Spanish - Beginner