Alex Lotito

90 Craig Road
Hillsdale, NJ 07642

alotito22@gmail.com (201) 663-0486

EDUCATION

The Pennsylvania State University, Smeal College of Business **University Park, PA**
Major: Finance *Expected Graduation Spring 2018*
Minor: International Business

- Cumulative GPA: 3.87 / Major GPA: 4.0
- Study Abroad experience at International Studies Institute (Florence, Italy - Spring 2017)
- Relevant Coursework: Micro-Economics Analysis, Macro-Economic Analysis, Financial and Managerial Accounting, Corporation Finance, Financial Management of Business, Financial Markets and Institutions, International Business (Florence, Italy)

WORK EXPERIENCE

Merrill Lynch **Paramus, NJ**
Global Wealth Management Advisory Intern *June 2017 – August 2017*

- Member of the advisory team responsible for evaluating potential investment opportunities and creating analyses and presentations to clients and internal team members to support investment recommendations.
- Constructed portfolio models in Excel that analyzed investment performance across multiple asset allocation scenarios.
- Conducted technical analyses that identified attractive areas for investment in the financial, healthcare, industrials and technology sectors.
- Determined target prices based on support and resistance levels and created presentations to senior team members to identify investment opportunities.
- Created Morningstar reports, analyses, and presentations to support client meetings.

Morgan Stanley **Paramus, NJ**
Wealth Management Intern *June 2016 – July 2016*

- Constructed financial analyses in Excel that incorporated ThomsonOne data and information from SEC filings to evaluate asset allocation decisions based on pricing, volume and other financial trends, which identified actionable investment opportunities in healthcare, industrial and technology sector ETFs.
- Prepared Monte Carlo risk models that determined probability-weighted returns for portfolios.
- Recommended portfolios to senior team members based upon technical analysis and market indicators.
- Prepared a diversified investment thesis and hypothetical portfolio which generated a >50% annual return on investment in 2016.
- Reviewed and analyzed prospectus to support sales efforts for the June 2016 IPO of Line Corp (NYSE:LN).

Sony Music Entertainment **New York, New York**
Finance Intern *June 2016 – July 2016*

- Worked directly with the Director of Finance to create analyses to evaluate financial trends, and used SAP and Excel to create, maintain and update financial statements.
- Created a financial forecast based on a bottoms-up methodology to project album sales for DJ Khaled's 2016 album "Major Key", driven by budgeted marketing spend, genre demand growth, and audio streaming unit economics, which accurately projected that the album would be certified as Gold by the Recording Industry Association of America.

Morgan Stanley **Ridgewood, NJ**
Wealth Management Intern *May 2015 – August 2015*

- Used ThomsonOne and Morgan Stanley's proprietary software to create and analyze portfolio allocation strategies and to research and analyze market trends to support recommendations for clients.
- Selected equity investments for a hypothetical portfolio, tracked monthly performance in Excel, and reviewed results with senior team members.
- Attended meetings with existing clients and prospects to support new business origination efforts.

ADDITIONAL INFORMATION

Skills:
- Proficient in Excel, PowerPoint, and ThomsonOne.

Leadership:
- Alpha Tau Omega Fraternity – Vice President (October 2015 – December 2016). Coordinated philanthropic events and orchestrated fundraising events, which raised ~$300,000 for Penn State's Dance Marathon for Pediatric Cancer research in 2017. Led chapter of 130 members in internal efforts, and served as head of judicial and review board.
- Penn State Asset Management Group (Fall 2016 – Present). Analyst in the Equity Research sector of the group, specializing in researching Technology stocks.