

# Chance B. Bootstaylor

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## EDUCATION

### Tufts University

*Bachelor of Arts in Economics*

*Minor in Finance*

**GPA:** 3.9/4.0; **ACT:** 34

**Honors/Awards:** Dean's List (2 Semesters)

**Relevant Coursework:** Calculus I, Intro to Finance, Intro to Psychology, Intermediate Macroeconomic Theory, Principles of Economics, Social Psychology, Foundations in Financial Accounting and Corporate Finance

**Relevant Programs:** 2022 Bracebridge Capital Internship (incoming), Blackstone Diverse Leaders Program, Vista Emerging Investors Summit, Morgan Stanley Freshman Enhancement Program, Bank of America Diversity & Inclusion Forum, Citi Freshman Discovery Program, KKR Diversity Insights Program, Fidelity Investments Diversity Insight Program, PIMCO Prep

**Medford, MA**

*Expected May 2024*

## EXPERIENCE

### The Baupost Group (32b AUM)

*Incoming Investment Analyst Intern, Public Equities*

**Boston, MA**

*February 2022 – May 2022*

- Will conduct in-depth fundamental research on an assigned public equity culminating in a pitch to the CEO

### The James Irvine Foundation (3.7b AUM)

*Investment Fellow, Foundation Investment Team*

**San Francisco, CA**

*June 2021 – August 2021*

- Attended a 3-day seminar with ten fellow interns and portfolio managers from various institutions discussing asset classes, investment strategies, and manager selection
- Participated in twice weekly manager meetings to aid in the due diligence process and gauge the managers' portfolio compatibility
- Researched the application of MSCI ESG ratings to sectors and public equities and analyzed the methodology behind these ratings
- Presented sector and company ESG analysis in a final 30-slide PowerPoint to 30 fellows, directors, and professionals at participating institutions ultimately revealing a correlation between ESG risk and changes in shareholder value

### Callodine Group (850m AUM)

*Equity Research Analyst Intern, Callodine Capital*

**Boston, MA**

*February 2021 – June 2021*

- Participated in weekly analyst meetings and assisted analysts through the completion of assigned projects and ad-hoc analyses
- Conducted research using Bloomberg, S&P Capital IQ, and sell-side analyst reports on COVID-19's effects on 85 portfolio companies held by top BDC positions and identified potential long/short opportunities in the Consumer Retail sector
- Created and presented a PowerPoint to the firm with in-depth analysis of the fund's largest BDC holding ultimately revealing primary portfolio risk concentration within 9 loans, potential market forward loss mispricing, and a final risk-reward of 28%

### Tufts University

*Research Assistant, Department of Economics*

**Medford, MA**

*August 2020 – January 2021*

- Analyzed the impact of the 2018 Chinese Peer to Peer Lending Crisis under a Tufts economics professor reviewed research papers on the effect of expanding health insurance availability in developing countries to assist a literature review

## LEADERSHIP EXPERIENCE & PROFESSIONAL DEVELOPMENT

### Tufts Alpha Fund (300k AUM)

*Equity Research Analyst*

**Medford, MA**

*September 2021 – Present*

- Collaborate with analysts to manage a student-run, long-only portfolio and participate in weekly meetings to discuss portfolio developments, current position sizing, and re-analyze original theses that may be affected by recent market developments

### BLK Capital Management (200k AUM)

*Equity Research Analyst*

**Medford, MA**

*February 2021 – Present*

- Collaborate with analysts from across the world in student-run hedge fund to perform equity research and lead Consumer Retail coverage team in developing industry reports that highlight prevailing trends and investment opportunities

### Tufts Financial Group

*Chief Operating Officer*

**Medford, MA**

*September 2020 – Present*

- Work closely with president and vice president to ensure smooth operations of various student training programs and speaker events

## OTHER ACTIVITIES & INTERESTS

**Activities:** SEO Career (Edge Participant), Middle Eastern Research Group, Tufts Economics Society, Black Student Union

**Technical Skills:** Microsoft Excel, Bloomberg Terminal, Bloomberg Query Language, S&P Capital IQ

**Interests:** Cars (Formula 1; exotics), films (Spielberg; Tarantino), and space exploration (Space Race; Space Shuttle program)