ALEXANDER MORGAN, CFA

Senior Equity Analyst | Portfolio Strategy

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SUMMARY

CFA charterholder and investment professional with 11+ years of experience in fundamental equity research, portfolio construction, and valuation across technology, industrials, and business services. Translate complex operating data into differentiated investment theses, risk-aware position sizing, and clear recommendations for institutional portfolios. Record of generating alpha through disciplined research, management engagement, and catalyst-driven analysis.

EXPERIENCE

Northbridge Asset Management — **New York, NY**
Senior Equity Analyst — *2021–Present*

- Lead fundamental coverage of 28 U.S. technology and industrial companies for a $1.8B long-only equity portfolio; recommendations contributed 230 basis points of cumulative excess return over three years.
- Build integrated three-statement, discounted cash flow, comparable-company, and scenario models; surface earnings inflections, valuation dislocations, and downside risks for weekly investment committee decisions.
- Originated 17 actionable ideas with a 68% positive absolute-return rate and 1.7-to-1 average upside/downside ratio at initiation; maintained written theses, catalysts, target prices, and risk triggers.
- Partner with portfolio managers on factor exposure, position sizing, and drawdown analysis; reduced sector-level tracking error by 12% while preserving expected alpha.
- Mentor three associates and standardized earnings-review templates, shortening post-release analysis time by 30% and improving consistency across the research platform.

Summit Ridge Capital Partners — **Boston, MA**
Equity Research Associate — *2017–2021*

- Covered 24 small- and mid-cap business services and software companies within a $650M concentrated strategy, producing initiation reports, quarterly updates, and management-meeting briefs.
- Developed cohort, unit-economics, and recurring-revenue models that identified a mispriced compounder; the position returned 54% versus 19% for its benchmark during the holding period.
- Conducted primary research with executives, customers, suppliers, and industry experts; converted findings into KPI forecasts and probability-weighted bull, base, and bear cases.
- Automated portfolio and earnings dashboards in Python and Excel, eliminating 15 hours of monthly manual work and improving data quality for 40+ tracked securities.

Granite Point Advisory — **Boston, MA**
Valuation Analyst — *2014–2017*

- Executed 45+ valuation and transaction-advisory engagements representing more than $12B in aggregate enterprise value across mergers, fairness opinions, and strategic reviews.
- Performed discounted cash flow, precedent-transaction, comparable-company, purchase-price-allocation, and weighted-average-cost-of-capital analyses for senior review and client presentations.
- Reconciled financial statements, market data, and operating assumptions under tight deadlines; earned promotion after two years based on analytical accuracy and client-ready communication.

EDUCATION

New York University, Leonard N. Stern School of Business — **New York, NY**
Master of Business Administration, Finance and Strategy — *2017*

Boston College, Carroll School of Management — **Chestnut Hill, MA**
Bachelor of Science, Finance; magna cum laude — *2014*

CERTIFICATIONS

Chartered Financial Analyst (CFA) Charterholder, CFA Institute, 2018 | **Certificate in ESG Investing**, CFA Institute, 2022

SKILLS

Investment: Fundamental research, portfolio construction, security selection, financial statement analysis, valuation, risk analysis, industry research, due diligence | **Technical:** Bloomberg, FactSet, Capital IQ, Excel (advanced), Python, SQL, Tableau