PATRICK BURNS

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EDUCATION

THE UNIVERSITY OF TEXAS AT AUSTIN, McCombs School of Business, Austin, TX **May 2018**
Master of Business Administration, Concentration in Finance

Teacher Retirement System of Texas - MBA Consultant

- Research and present the impact of Autonomous Vehicle technology on public equity portfolios

The MBA Investment Fund, L.L.C. – Student Portfolio Manager, Managing Director

- Financial sector equity research and portfolio management for $24 million fund

VILLANOVA UNIVERSITY, School of Business, Villanova, PA **May 2010**
Bachelor of Business Administration, Major GPA 3.67

EXPERIENCE

STATE STREET GLOBAL ADVISORS, Boston, MA **2013 – 2016**
Senior Performance Analyst (2015 – 2016)

- Produced and explained detailed analytics on benchmark relative performance to Active Equity Portfolio Managers and clients informing the future strategies of 90 funds totaling more than $6 Billion AUM
- Implemented a new procedure to track daily performance of 150+ Exchange Trade Funds to ensure execution of strategy; Scope of project was expanded by 30% after the success of the initial implementation
- Improved data quality and reduced data errors in daily, monthly and quarterly alpha and dispersion reports provided to senior management to highlight precision of tracking error

Portfolio Analyst (2013 – 2015)

- Managed cash exposure for emerging and developed market equity hedge funds (over $1 Billion in AUM), instructed forex trades based on projections of trades and client activity; Reduced cash exposure by an average 30% and trading turnover with use of futures and improved cash projections
- Analyzed country weight exposure versus benchmark informing rebalance trades for Portfolio Management
- Implemented a new daily cash management application in coordination with Modeling and Investment leaders, developing a new process and testing for adherence to local market practices
- Managed an investment allocation process directing client flows to separate portfolio sleeves, analyzing preliminary returns for Portfolio Managers to proactively resolve unexpected tracking errors
- Improved productivity and efficiency by automating a cash and position reconciliation report reducing processing time by 85% while supervising this reconciliation performed by team of Analysts in Bangalore, India

INCOME RESEARCH + MANAGEMENT, Boston, MA **2012 – 2013**
Junior Associate

- Interpreted and executed Portfolio Manager's presentation strategies for client meetings, RFP's and questionnaires with marketing materials and pitch books
- Led Short Duration marketing efforts ($1.5 Billion AUM), updating visuals and creating value propositions, including scenario analysis, portfolio modeling, and macro-economic analysis within GIPS guidelines

BROWN BROTHERS HARRIMAN, Boston, MA **2010 – 2012**
Operations Specialist

- Managed international Corporate Actions (including courtesy calls, trade reconciliation, tracking stock loan positions), establishing relationships and proactively anticipating needs of BBH clients and resolving issues
- Analyzed and identified best performing Sub-Custodian relationships informing Relationship Managers to increase operational efficiency and justify fee structure in weekly leadership meetings

ADDITIONAL

- CFA Level 3 Candidate
- Excel Macros, VBA and SQL proficiency
- **Work Eligibility:** Eligible to work in the United States with no restrictions