

## 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

*Relationship Associate*

- Supported senior management with sales activities and prepared pitch decks.
- Authored monthly investment reports detailing the performance of top and bottom contributors by analyzing earnings reports, corporate press releases, and industry trends.
- Spearheaded financial reporting by preparing budget and expense reports for the annual audit.
- Identified market drivers, evaluated economic indicators, and assessed financial sector developments to prepare weekly presentations on Japan's market movements.
- Managed investment activities, including documentation and workflow for onboarding and redemption.

**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*

- Provided academic and career guidance to students.
- Organized the location and time of department programs with the university.
- 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