

VIJAY PATEL
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EDUCATION

University of Tennessee, *Cum Laude*, Knoxville, TN May 2014
Major: Finance & Economics
Minor: Accounting
London School of Economics, London, UK Summer 2013
Options, Futures and Other Derivatives
Cornell University, eCornell Summer 2012
Hotel Real Estate Investments and Asset Management
Passed Level III of CFA Program June 2016

WORK/EXPERIENCE

BPV Capital Management (Formerly Quintum Advisors), Knoxville, TN February 2014 – August 2016
Analyst (Formerly Quantitative Analyst)

- Monitored portfolio holdings, with a focus on initiating, optimizing and closing option strategies
 - Assisted the portfolio manager in overseeing the BPV Wealth Preservation Fund (BPVPX)
 - Managed \$180 million of AUM in an options based hedged equity strategy
- Conducted financial modeling to evaluate the risk/return profiles of various trades and option strategies
 - Developed and maintained risk management models using Bloomberg API
- Conducted market analysis and contributed to the collective knowledge of the investment team
 - Covered US equities with sector focuses on technology, healthcare, staples and utilities.
- Created research reports deliverable to the portfolio managers and the investment committee
 - Composed the market commentary disseminated to fund shareholders in the quarterly letters

Tennessee Valley Authority (Through the University of Tennessee), Knoxville, TN August 2013 – May 2014
Portfolio Manager

- Actively managed a portfolio consisting of over \$355,000 in all domestic equity securities with an objective to achieve long-term capital growth
- Conducted bottom-up equity research with a focus on large cap value using a Bloomberg terminal
- Rebalanced asset allocations and performed sector research
- Presented portfolio performance and fund strategy to TVA executives and reported a 32.4% return from January-November 2013

North Cedar Hospitality LLC, Knoxville, TN July 2011 – May 2013
Associate, Real Estate Development

- Underwrote and analyzed strategic real estate acquisitions using discounted cash flow valuation models
- Served as the affiliate broker for any commercial real estate acquisitions

ACTIVITIES

UT Financial Management Association Fall 2011 – May 2014
UT Investors Group January 2012 – May 2014
Beta Chi Theta Fraternity, Co-Founder November 2011 – May 2014
VPI Realty, Affiliate Broker May 2011 – May 2013

SKILLS/LICENSES

- Office Applications (Excel, Word, Access, etc.)
- Bloomberg, FactSet
- Programming- Java, Visual Basic, HTML
- Series 65