VINCENT C. MUSCOLINO

D'Amore-McKim School of Business

Finance Group

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Boston, MA 02115

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***PROFESSIONAL QUALIFICATIONS:***

Undergraduate and graduate course development and enhancement. Developed and launched new undergraduate Portfolio Management course. Developed graduate Bloomberg Skills training for incoming MBA and MSF programs.

Developed Personal Financial Planning and Financial Literacy and Financial Literacy Leadership for Social Capital Wealth-building Inequities intersession course. Focused on Social Impact with financial literacy programs.

Bloomberg Expert Coordinator. Responsible for over 7,000 student certifications. Qualified Northeastern for the Bloomberg Experiential Learning Partner program.

Created the D’Amore-McKim Bloomberg Business Lab website access offering Bloomberg Certification and ESG Certificate.

Created the D’Amore-McKim Financial Literacy Financial Life Simulation website access offering a financial literacy certificate.

Developed Bank of America Collaboration.

Teach and enhance curriculum for NU Accelerate incoming students.

Worked with Smart Women Securities, Tamid, WISE, BBR, and Case competition clubs.

Selected as a featured Northeastern University faculty speaker for the 2017 BLOOMBERG FOR EDUCATION “How to Integrate Bloomberg into Your Finance Curriculum” forum. Presented to several hundred professors in attendance. Provided framework and “best practices” for incorporating Bloomberg research into course design and intellectually challenging learning assignments to enhance critical thinking and enrichen student academic experience.

Continuously provide Bloomberg research training and assistance to Northeastern faculty and Bloomberg Lab users.

Develop Bloomberg simulation models for case analysis and course enrichment.

Develop course materials and projects that enhance the student experience with Bloomberg research training and applications to achieve course learning outcomes. Differentiate student resumes by incorporating Bloomberg Market Concepts BMC certification. Stimulate critical thinking by teaching students to conduct detailed business and financial research - both on campus and on the job - through the use of Bloomberg and several other Northeastern Library resources!

Published several research articles for Babson Staff Letter

Multiple TV appearances and media quotes related to research and financial markets.

Long/Short Equity Portfolio Manager and analyst experience complemented by in-depth industry research process.

Strong analytical skills grounded in bottoms-up fundamental analysis of business segments, operating plans, budgets, cash flows, earnings, balance sheets, products and market shares.

Demonstrated ability to make recommendations amidst uncertainty. Collaborative team player.

Experience identifying emerging trends and addressable markets. Perceptive. Keen eye for disruptive technologies.

Extensive due diligence experience with over 2000 CEOs and CFOs. Strong critical thinker.

Exceptional financial modeling and competitive analysis skills. Solid industry contacts to validate factors impacting growth drivers and other key assumptions.

**EXPERIENCE:**

**NORTHEASTERN UNIVERSITY, Boston, MA** 2009 - Present

Professor and Bloomberg Expert Coordinator

Undergraduate and graduate course development and enhancement. Developed and launched new undergraduate Portfolio Management course. Developed graduate Bloomberg Skills training for incoming MBA and MSF programs.

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Continuously provide Bloomberg research training and assistance to Northeastern faculty and Bloomberg Lab users.

Develop Bloomberg simulation models for case analysis and portfolio management course enrichment.

Develop course materials and projects that enhance the student experience with Bloomberg research training and applications to achieve finance course learning outcomes. Differentiate student resumes by incorporating Bloomberg Market Concepts BMC certification. Stimulate critical thinking by teaching students to conduct detailed business and financial research - both on campus and on the job - through the use of Bloomberg and several other Northeastern Library resources!

Present practical and theoretical Business Analysis approaches to undergraduate and graduate program participants. Instruct online graduate (MBA, MSF) courses and utilize technology for undergraduate courses.

Develop curriculum based upon industry practices, current events and course materials to achieve university objectives.

Within lecture, group discussion, and simulation formats, cultivate critical thinking approaches to business, including management, business planning, valuation, DCF, company financial statement analysis and industry analysis.

**AEGIS/CAPITAL/WELLS FARGO ADVISORS, Boston, MA** 2009 - 2020

Portfolio Manager and Advisor

Lead Quantitative and Fundamentally research and methodologies. Research includes factor backtesting and simulation models.

Advise clients on financial asset management and retirement planning. Manage portfolios and AUM. Conduct seminars. Consult clients on strategy, financial analysis processes, risk management, business development and “best practices”.

Conduct detailed industry analysis to identify growth rates, trends, competitive dynamics, addressable market, supply chains, industry leaders, laggards and turnaround candidates. Research market sectors and industries real time.

Fundamentally analyze securities to select both undervalued and overvalued stocks. Apply due diligence research process to determine risk/reward and appropriate price targets. Strong focus on sustainable growth and Long/Short.

**BURL CAPITAL/TRIPOINT ASSET MANAGEMENT, Boston, MA**

Portfolio Manager and Analyst June 2006 - December 2008

Led Quantitative and Fundamentally research process.

Long/Short PM and research analyst for REITS, technology, consumer, transportation and energy sectors and industries.

Leveraged industry contacts and investment contacts to add Alpha to portfolio management performance.

Investment process involved market data analysis and product research to forecast pricing and market share trends.

Generated buy and sell recommendations, emphasizing earnings and cash flow based analysis and valuation methodology.

Presented new investment ideas to exploit mispriced securities and underlying industry trends.

Scrutinized changes in non-cash working capital and balance sheets to predict future earnings headwinds and tailwinds.

**MASSMUTUAL AFFILIATE BABSON CAPITAL, Boston, MA**

Portfolio Manager and Analyst 2000 – May 2006

Published several research articles for Babson Staff Letter.

Multiple TV appearances and media quotes related to research and financial markets.

Portfolio manager and Securities analyst for technology, consumer, industrials and utility sectors.

Investment process included researching and validating products, R&D strategies and capital investment roadmaps.

Utilized industry contacts to add alpha to portfolio performance.

Developed cash flow analysis tools to improve stock selection criteria.

Worked effectively with portfolio managers to generate new ideas and provide timely maintenance research updates on existing positions in portfolios. Spearheaded fundamental Bull-Bear research debate process to refine security selection.

Mentor and train junior team members and new hires to provide them the learnings skills for research analysis.

**PIONEER INVESTMENT MANAGEMENT/PIONEER GROUP, Boston, MA**

Analyst and Research Generalist 1997 - 2000

Provided fundamental analysis for technology, consumer, health care, and transportation industries. Developed torpedo avoidance tools based on financial controller experience.

Responsible for sector and industry financial modeling and company performance interpretation versus peers.

Assisted portfolio managers in assessing proper sector and industry weightings and evaluating sector opportunities.

Mentor and train junior team members and new hires to provide them the learnings skills for research analysis.

**ASCENTIAL SOFTWARE (acquired by IBM), Westboro, MA**

Operations and Sales Controller 1994 - 1996

Analyzed business practices and recommended revenue enhancing and cost saving opportunities.

Identified variances and initiated corrective actions to ensure execution of operating plan.

Developed worldwide "bottoms up" budget/operating plan.

Resolved escalated accounts receivable issues and managed working capital reduction program.

Managed capital expenditure (CAPEX) budget - empowered with final signoff authorization.

Developed technology industry reports to compare Ascential’s financial and product performance to other public

technology companies. Dissected and data mined competitor Annual Reports, 10K’s, 10Q’s and other filings.

Utilized industry research to develop top quartile financial targets (DSO, Sales Growth and Earnings Growth) for Ascential relative to its technology peer group.

Prepared quarterly earnings and tech conference presentations made to investors and buy/sell side analysts.

**EDUCATION:**

BABSON GRADUATE SCHOOL OF BUSINESS, Wellesley, MA 1995

Master of Business Administration

NORTHEASTERN UNIVERSITY, Boston, MA 1986

Bachelor of Science in Business Administration with Engineering Core