

Joshua DeSousa

EDUCATION

Rotman School of Management & Department of Economics, University of Toronto <i>Master of Financial Economics</i> – Upcoming Relevant Courses: Corporate Financing II (MBA), Financial Economics (MA), Options and Futures Markets (MBA)	Toronto, Ontario <i>Expected June 2027</i>
Ted Rogers School of Management, Toronto Metropolitan University <i>Bachelor of Commerce (Major in Economics and Management Science)</i> – Academics: cGPA 3.76/4.33 – Awards/Scholarships: Graduated with Honours; Dean's List; Top 200 Student; Department of Economics Excellence Award – Relevant Courses: Investment Analysis (A+); Financial Modelling (A+); Management Accounting (A+); Managerial Finance (A)	Toronto, Ontario <i>Sep 2018 – Jun 2023</i>

INDUSTRY CERTIFICATIONS

– Corporate Finance Institute – Financial Modelling and Valuation Analysis (FMVA)	2025
– CFI – Accounting Fundamentals, 3-Statement Modeling, DCF Valuation Modeling, M&A Modeling	2025
– Passed CFA Level I	2024
– Bloomberg Market Concepts	2020

PROFESSIONAL EXPERIENCE

BCI <i>Incoming Intern – Public Markets</i>	Victoria, British Columbia <i>Jan 2026 – April 2026</i>
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Mackenzie Investments <i>Manager – Product Development</i> – Enhanced portfolio yield of new derivative products to generate 9% gross yield by sensitizing for option writing inputs and targets – Raised over \$200M in gross sales through the construction and launch of 4 new complex investment products – Performed macro research to identify attractive opportunities for new investment vehicles across geographies and asset classes	Toronto, Ontario <i>July 2024 – May 2025</i>
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<i>Associate Manager – Product Development</i> – Utilized Bloomberg and Morningstar to create and present over 10 assessments analyzing fund creation opportunities to management – Collaborated with various stakeholders to bring 8 new investment solutions to the market for Canadian retail clients	<i>Jan 2023 – July 2024</i>
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RBC Global Asset Management <i>Intern – Investment Solutions</i> – Authored monthly reports for advisors regarding RBC Portfolio Solutions showcasing tactical moves and portfolio performance – Synthesized research on external fund offerings to compare positioning relative to RBC products and inform product success – Compiled competitor product developments to provide recurring insights to the division to inform decision making	Toronto, Ontario <i>Sep 2021 – May 2022</i>
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Mackenzie Investments <i>Intern – Product</i> – Utilized Bloomberg and Morningstar Direct to create business case presentations recommending fund creation opportunities – Developed detailed Excel models to analyze proposed fund fee structures and their effect on fund profitability – Developed new processes to recommend and model fund merger opportunities and their effect on the firm to senior management	Toronto, Ontario <i>May 2021 – Sep 2021</i>
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EXTRACURRICULAR ACTIVITIES

Student Investment Group <i>Analyst, Consumers</i> – Pitched 3 large cap Consumer Discretionary companies (PENN, LULU, CROX) to a panel of industry professionals – Created DCF and comparable valuation models using Bloomberg and Excel for selected large cap Consumer Discretionary stocks – Synthesized research from 5 other Consumer sector analysts to create pitchbooks to be presented to 6 portfolio managers	Toronto, Ontario <i>Sep 2020 – Sep 2022</i>
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Battle on Bay Case Competition <i>Team Captain</i> – Ranked 3 rd place; led team of 3 in conducting equity research on Penn National Gaming (NASDAQ: PENN) – Developed DCF model and performed comparable valuation analysis to calculate a range of shares prices for Penn National Gaming	Toronto, Ontario <i>Jan 2021</i>
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PERSONAL

– Technical skills: Familiar with Excel, PowerPoint, Bloomberg Terminal Services, Capital IQ, Morningstar Direct, FactSet
– Languages: English, Spanish
– Interests: Soccer (played with current Team Canada members), Golf, Coaching (coached the #1 ranked U14 soccer team in Ontario)