

## CURRICULUM VITAE

# EDDIE SANCHEZ, JR., DBA

Warrington College of Business

University of Florida

352-392-9765

[esanchez1@ufl.edu](mailto:esanchez1@ufl.edu)

### ACADEMIC APPOINTMENTS

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#### University of Florida

Assistant Clinical Professor

Present

#### University of South Florida

Assistant Professor of Instruction and Director, Bloomberg Financial Markets Lab

2019 - 2023

- Courses taught: Principles of Investments (evaluations 5/5)  
Financial Markets and Institutions (evaluations 4.94/5)  
Advanced Investment Analysis and Management (evaluations 5/5)  
Financial Statement Analysis (evaluations 4.6/5)

#### University of Tampa, Sykes College of Business Adjunct Instructor, Finance

2017-2018

- Courses taught: Investment Analysis and Portfolio Management (evaluations 4.61/5)  
Financial Markets, Institutions and Money (evaluations 4.66/5)

#### University of South Florida, Muma College of Business Adjunct Instructor, Finance

Spring 2018

- Courses taught: Financial Statement Analysis (evaluations 4.10/5)

### EDUCATION

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#### University of Florida, Hough Graduate School of Business, Gainesville, FL

- Doctorate Business Administration (DBA), Finance  
Dissertation Chair: Dr. Andy Naranjo

#### Creighton University, Omaha, NE

- Master Business Administration
- Master Security Analysis & Portfolio Management

#### Trinity College, Hartford, CT

- Master of Arts Economics

#### Quinnipiac University, Hamden, CT

- Bachelor of Science Computer Science

### AWARDS/HONORS

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- USF Professor of the Year 2022- 2023
- USF Nominated for Teacher of the Year (2020)
- Member of Alpha Sigma Nu National Honor Society
- Beta Gamma Sigma International Honor Society

### RESEARCH INTERESTS

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- Financial Institutions, Mutual Funds and Hedge Funds, Capital Markets, Municipal Bonds

# EDDIE SANCHEZ, JR., DBA

## CURRENT RESEARCH ACTIVITY

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### ■ Publications

“The Unexpected and Stickiness Behavior of Institutional Investors in Index Funds” (with Junho Oh), *Managerial Finance*, 2020, Vo. 47 No. 1, 4-35

### ■ Research in Progress

“Institutional Ownership and Municipal Bond Performance” (with T. Li and A. Naranjo)

## SERVICE

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- Director, Bloomberg Financial Markets Lab
- Merrill Lynch Wealth Management Board – Chairman Financial Literacy Committee
- Executive Search Committee – Dean of the Kate Tiederman School of Business
- Masters Program in Finance Review Committee
- Enrollment and Recruitment Task Force Committee
- Graduate Policy Committee
- Academic Regulations Committee
- Diversity Equity and Inclusion Committee

## EXPERIENCE

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**First New York Capital Management**      **New York, NY**      **2015-2017; 2009-2011; 2005-2007**

*Partner/Portfolio Manager*

- Managed proprietary funds for First New York Securities, focusing on long/short Technology investing.
- Invested primarily in large-, mid-, and small-capitalization Technology companies leveraging vast and extensive experience in portfolio management, security analysis, and trading.
- Implemented trading strategies in periods of high volatility to protect returns in the portfolio by shorting stocks and buying/selling options.

**Blackthorn Investment Group**      **Overland Park, KS**      **2011-2014**

*Portfolio Manager*

- Managed \$100mm long/short equity portfolio focusing on Technology and Telecommunications.
- Leveraged nearly 20 years of experience in the TMT sectors to establish a long/short portfolio of 50-60 names with a heavy emphasis on bottom-up stock selection.
- Utilized a rigorous profit/loss-mitigation strategy that locks in profits on performing ideas and reduces exposure on underperforming ones.
- Researched and performed fundamental analysis interacting with Wall St. analysts, industry contacts, and company management.
- Value-added process derived from marrying knowledge of critical data points that drive stock prices and trading expertise to optimize entry and exit points.

# EDDIE SANCHEZ, JR., DBA

**Credit Suisse** **San Francisco, CA** **2008-2009**

Portfolio Manager

- Managed \$250mm of proprietary funds long/short focusing on Technology, Media, and Telecommunications. (**Performance returns: 5.0% on an absolute total return basis**)
- Leveraged nearly 15 years of experience in the TMT sectors to establish a long/short portfolio of 75-100 names with a heavy emphasis on bottom-up stock selection.
- Utilized a rigorous profit/loss-mitigation strategy that locked in profits on performing ideas and reduced exposure on underperforming ones.

**The Galleon Group** **New York, NY** **2004- 2005**

Managing Director/Portfolio Manager

- Member of \$4bn Technology Investment Group; Managed long/short technology portfolio specializing in the Software and Services sector.
- Researched and invested in large-, mid-, and small-cap software and service companies, for direct investment in the Software/Services portfolio as well as The Galleon Group general technology portfolio.
- Trained and managed two fundamental analysts responsible for developing a knowledge base of companies and performing bottom-up research to formulate investment recommendations both long/short.

**ES Capital Partners, LLP/ES Advisors, LLC/First NY Securities** **New York, NY** **2001-2004**

Founder/General Partner/Managing Director/Portfolio Manager

- Managed long/short equity hedge fund specializing in Technology and Financial Services investments.
- Utilized 15 years of technology investment experience to train and manage three fundamental analysts focused on companies in the following sub sectors: Hardware, Networking, Semiconductors, Semiconductor Capital Equipment, Services, Software, Telecommunications, and Financial Services.
- Long/short investments were based on evaluation of business and financial models, management interviews, competitive analysis, and channel checks.
- Devised and implemented portfolio hedging strategies using options to limit losses and to capture outsized gains in periods of extreme volatility.

**Citigroup Investments** **New York, NY** **1995-2001**

Vice-President/Portfolio Manager

- Co-Managed long/short equity hedge fund specializing in technology. (**Audited performance returns: 233% vs NASDAQ of 46.6% from 02/1998 – 05/2001**)
- Performed fundamental analysis on large-, mid-, and small-cap Technology companies with areas of concentration in Hardware, Services, and Software.
- Fundamental research tools included review of SEC filings, participation in earnings conference calls, meetings with management, and vetting of financial models and forecasts. Developed and maintained proprietary financial models including DCF analyses, proforma merger dilution/accretion analyses.

# EDDIE SANCHEZ, JR., DBA

**Travelers Group**

**Hartford, CT**

**1989–1994**

*Accelerated Entry into Management Program for Information Technology (9-12-month rotations)*

## **Corporate Finance**

- Member of four-person strategic development team reporting to Chief Financial Officer; Analyzed information systems and business processes across four lines of businesses to enhance financial reporting to corporate systems and advance quarterly reporting cycles.

## **Managed Care and Employee Benefits**

- Member of three-person strategic development team assigned the responsibility of developing a Quality Management Information System for the senior management team of Managed Care and Employee Benefits.

## **Asset Management and Pension Services**

- Completed conversion of a hierarchical database to a relational database. Prepared systems specifications for a group annuity system.

## **Financial Services/Life and Annuity**

- Systems analyst/programmer coding in COBOL for both batch and on-line systems to process insured contracts.

## **AFFILIATIONS**

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### **Cardinal Hayes High School, Bronx, NY**

- Board member of the Cardinal and Gold Fund
- Member of the Investment Committee

## **SKILLS**

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- Proficient in Spanish, NASD Series 7, 55, 63
- Familiarity with Bloomberg, Reuters, Excel, Thomson Analytics, and FactSet

# EDDIE SANCHEZ, JR., DBA

## REFERENCES

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- **Andy Naranjo (Committee Chair)**  
John B. Hall Full Professor & Chair  
University of Florida,  
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- **Mahendrarajah Nimalendran**  
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- **Michael Ryngaert**  
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