

# Brendan M. Erhard

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AI Investing Project portfolio: <https://bme-ai-investing.vercel.app/> || GitHub: <https://github.com/bme3412>

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## Experience

11/15 – Present **Columbia Threadneedle Investments** – *Portfolio Analyst, Global Technology Growth Fund* **Boston, MA**

- Analyst on the Global Technology Growth Fund (CMTFX) Equity strategy, AUM \$4.0 bn; winner of Refinitiv Lipper Fund award 5 consecutive years in the science and technology category; vs category peers, the fund has generated top-quartile performance over the trailing 5 years (193 funds in category) and top-decile performance over the trailing 10 years (156 funds); assets have expanded from \$500m during my time on the strategy
  - Responsible for ongoing company-specific research, idea generation, and implementation of investment ideas across all market capitalizations, sectors, and geographies within the global technology landscape
  - Lead analyst for all technology and healthcare IPOs (100+ per year) and make recommendations for participation and deployment of capital (minimum \$10m) into market-leading hyper-growth companies in the US, Europe and Asia
  - Build and maintain financial models with Microsoft Excel to size addressable markets and potential growth opportunities, as well as to estimate future earnings and cash flow generation, to estimate intrinsic value of underlying securities
  - Use Python programming language to integrate company-specific Microsoft Excel financial models to form interactive sector analysis, valuation stress-testing, and industry demand models and for dynamic quantitative screening
  - Interact with industry participants through hosting management teams, analyst calls and attending industry events, including investor conferences and internally hosted non-deal roadshows
  - Initiate and maintain written and verbal communications with Senior Portfolio Manager, focusing on the critical variables driving an investment thesis, supported with creative use of Python to provide compelling data-supported conclusions
  - Represent portfolio management in front of new and prospective clients (ex: China State Administration Foreign Exchange; sovereign wealth fund of Saudi Arabia; Australian superannuation fund, etc)

3/11 – 11/15 **Columbia Threadneedle Investments** – *Portfolio Analyst, Large Cap Equity* **Boston, MA**

- The junior member of the Select Large Cap Equity (NSEPX), Dividend Income (LSBAX), and Global Infrastructure (CRIZX) fund strategies (77 accounts, total AUM ~\$15.0 billion); responsible for implementation of investment decisions, portfolio analysis, and company-specific and sector research
- Interfaced with research analysts, traders, and portfolio managers to analyze and implement investment decisions
- Collaborated with senior portfolio managers and trading desk to develop trading and execution strategies to ensure alignment with investment mandate and strategies
- Created proprietary quantitative screens to generate investment ideas from a universe of 1,200+ equity securities

9/19 – present **LLM & AI Investing Projects** – *Artificial Intelligence applied to Investing* **Boston, MA**

- Build full stack apps that incorporate large language models (OpenAI, Anthropic, Google Gemini) and AI frameworks (langchain, llama-index, Pinecone vector database) with financial data APIs to enhance and automate investment analysis
- Clarity 2.0 - investment co-pilot that enables users to ask anything about Big Tech companies through generative AI, link: <https://investment-copilot-eight.vercel.app/>
- LLM-Investment blog: Comprehensive thought pieces and case studies about the advantages of using AI to transform investment management; link: <https://investment-llm.vercel.app/>
- Resume-LLM: Interactive resume powered by AI - Ask questions about my background, projects, and skills using your preferred generative AI model; link: <https://llm-resume-bme.vercel.app/>
- Complete AI investing project portfolio can be found here: <https://bme-ai-investing.vercel.app/>

## Education

9/06 – 5/10 **Boston College** – *College of Arts and Sciences* **Chestnut Hill, MA**

- Bachelor of Arts in International Studies with a concentration in Economics
- GPA: 3.55/4.00; participated in semester-long study abroad program at Institut d'Etudes Politiques de Paris in Paris, France

## Skills and Extracurricular

- High school class valedictorian (class size: 500); Boy Scouts of America: Eagle Scout Award (100+ hour service project)
- Technology skills: Microsoft Office, Bloomberg (BQNT and BQL); Blackrock Aladdin trading; MySQL, MongoDB
- Python skills: pandas, matplotlib/seaborn, numpy, scikit-learn, bokeh; web scraping (BeautifulSoup, Selenium)
- Web development skills: flask, JavaScript, HTML/CSS, building REST APIs, AWS lambda
- LLM: OpenAI, Anthropic, Replicate.ai; huggingface; langchain, llama-index; Pinecone, Chromas, FAISS