

Brendan M. Erhard

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

Experience

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

- Senior Analyst on the Global Technology Growth Fund (CMTFX) Equity strategy, AUM \$4.1 bn; I oversee the full life cycle (data, research, analytics, portfolio monitoring, and trading) for the investment strategy which was \$500m when I joined and has generated compound annual returns of 19.9% (10 year) with top quartile performance for 5- and 10-year periods
 - Responsible for establishing a system to orchestrate company-specific research, idea generation, implementation and capital deployment of investment ideas across the global technology landscape, with a focus on software companies
 - Initiate and maintain written and verbal communications with Senior Portfolio Manager, focusing on the critical variables driving an investment thesis as it relates to position monitoring and capital deployment decisions
 - Represent the strategy through regular meetings with senior executives of technology companies, and attend industry events, including investor conferences and internally hosted non-deal roadshows
 - Owned the strategy's data infrastructure by building an AWS + Airflow pipeline ingesting ~100K daily data points from 50 global tech companies, cutting analysis turnaround by ~30% and improving research coverage by 25%
 - Architected and deployed a full-stack platform (Flask/React/PostgreSQL/Pinecone vector database) that automated analysis of unstructured analyst reports using custom NLP pipelines and real-time market data streams, deepening analysis across 50+ companies through quantitative insights while generating trading signals that drove \$50M+ in portfolio adjustment
 - Directed global equity trading for \$4.1 billion portfolio across US, European, and Asian markets, optimizing execution strategies to reduce implementation time while managing market impact for complex order flow
 - Participated in presentations for new and prospective global 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

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/React, building REST APIs, AWS lambda
- LLM: OpenAI (Tier 4 developer), Anthropic, Google Gemini; langchain, llama-index; Pinecone vector DB
- NVIDIA-Certified Associate: Generative AI LLMs (March 2025) - Validated skills in generative AI and large language models
- AWS Certified Cloud Practitioner (June 2025) - Demonstrated foundational knowledge of AWS cloud services