Olivia Grant

Capital Markets Analyst

Capital markets analyst with 2 years in debt capital markets at a Charlotte bank, supporting syndicated loans and bond offerings for middle-market and investment-grade borrowers. Builds pricing and comparable deal analyses in Excel, prepares lender and rating agency presentations in PowerPoint, and sends market updates to 30+ clients.

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Charlotte, NC

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Experience

Capital Markets Analyst

07/2024 - Present

Carolina Trust Bank — Charlotte, NC

Regional bank with $60B in assets; debt capital markets group.

- Support pricing and structuring on **25+** syndicated loans and fixed income deals a year totaling $6B.
- Build comparable deal and pricing grids in Excel from Bloomberg data for 30+ clients' weekly updates.
- Create lender presentations, rating agency decks and term sheets in PowerPoint and Word for 12 issuers a year.
- Track allocations and order books with the syndicate desk, closing all 2025 deals on schedule.

Capital Markets Summer Analyst

06/2023 - 08/2023

Uptown Securities — Charlotte, NC

Broker-dealer focused on municipal and corporate bonds.

- Compiled daily new-issue calendars covering 50+ corporate and municipal bonds.
- Built an Excel model comparing refinancing savings for 3 hospital borrowers.
- Drafted market commentary used in 20 client emails by the sales team.
- Reviewed issuer financials for credit analysis notes on 10 bond offerings.

Certificates

Securities Industry Essentials (SIE)

02/2024

FINRA

Series 79 Investment Banking Representative

12/2024

FINRA

Bloomberg Market Concepts (BMC)

01/2024

Bloomberg

Skills

Debt Capital Markets

Syndicated Loans

Term Sheets

Credit Analysis

Fixed Income

Excel

PowerPoint

Word

Bloomberg

Attention to Detail

Education

Bachelor of Science

05/2024

University of North Carolina at Chapel Hill, Kenan-Flagler Business School

Chapel Hill, NC

Business Administration, Finance