Kevin Tran

EQUITY RESEARCH ASSOCIATE

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Summary

Equity Research Associate with 16 months on a software and internet coverage team in San Francisco, supporting 14 covered stocks. Updates financial modeling in Microsoft Excel after each earnings release, drafts equity research notes, and builds quantitative peer screens. Able to work independently through tight earnings-season deadlines.

Skills

- Equity Research
- Financial Modeling
- Comparable Company Analysis
- Discounted Cash Flow
- Valuation
- Microsoft Excel
- Bloomberg
- Work Independently
- Intellectual Curiosity

Experience

Equity Research Associate 07/2025 - Present

Embarcadero Equity Partners San Francisco, CA

Research boutique covering 120 technology stocks.

- Update financial modeling for **14** software companies within 12 hours of each earnings report.
- Draft first versions of 30 earnings previews and recaps for the senior analyst.
- Build comparable company analysis on 60 peers from Bloomberg data, tracking growth, margins and valuation multiples.
- Survey 40 IT buyers each quarter and summarize spending trends for client notes.

Teaching Assistant, Corporate Finance 08/2024 - 05/2025

University of California, Berkeley Berkeley, CA

Part-time role for an undergraduate corporate finance course.

- Held weekly office hours for **60** students on valuation and discounted cash flow problems.
- Graded 120 problem sets per assignment and posted answer keys within 48 hours.
- Wrote 8 practice cases on comparable company analysis for exam review sessions.

Equity Research Intern 06/2024 - 08/2024

Golden Gate Securities San Francisco, CA

Summer internship on the semiconductor research team.

- Built a revenue model for a chip equipment maker from **10** years of 10-K segment data.
- Compiled 25 channel check call notes into a weekly summary for the lead analyst.
- Checked 18 published charts and tables against source filings before release.

Education

Bachelor of Science 05/2025

University of California, Berkeley Berkeley, CA

Business Administration

Certificates

CFA Level I (Passed)

CFA Institute

05/2026