

Owen Brandt

PORTFOLIO ANALYST

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SUMMARY

Portfolio Analyst with 4 years supporting multi-asset and fixed income portfolios at Minneapolis wealth and insurance firms. Runs performance attribution, rebalancing and financial analysis in Microsoft Excel, builds Power BI reporting for 11 portfolio managers, and keeps client materials accurate through organizational skills and attention to detail.

SKILLS

Other Skills: Financial Analysis, Performance Attribution, Rebalancing, Fixed Income, Microsoft Excel, Power BI, PowerPoint, Word, Organizational Skills, Attention to Detail

EXPERIENCE

Portfolio Analyst
North Star Wealth Management
Wealth manager with \$4.8B for 2,600 families.

- Run daily drift reports on **3,200** accounts and queue rebalancing trades for portfolio manager approval.
- Build Power BI dashboards on performance, cash and concentration for 11 portfolio managers.
- Produce monthly performance attribution for 9 model portfolios and explain the results in PowerPoint.
- Update Word investment policy statements for 70 new clients a year.

03/2024 - Present
Minneapolis, MN

Investment Analyst
Lakeshore Mutual Insurance
Regional property and casualty insurer.

- Monitored a **\$1.9B** bond portfolio against duration and credit limits each week.
- Prepared quarterly investment reports for the board finance committee.
- Modeled 3 interest rate scenarios on investment income for the annual plan.
- Cleaned 8 years of holdings history ahead of a new investment accounting system rollout.

06/2022 - 02/2024
St. Paul, MN

Investment Intern
Mill City Capital Advisors
Summer internship with a registered investment adviser.

- Built monthly Excel fact sheets for **12** model portfolios.
- Researched 40 ETFs for the approved list and summarized fees and tracking error.
- Updated CRM account records for 500 client households.

06/2021 - 08/2021
Minneapolis, MN

EDUCATION

Bachelor of Science in Business
University of Minnesota
Finance

05/2022
Minneapolis, MN

CERTIFICATES

Certificate in Investment Performance Measurement (CIPM)
CFA Institute

04/2025