

## DEREK A. SBROGNA

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### EDUCATION

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**THE UNIVERSITY OF TEXAS AT AUSTIN, McCombs School of Business** - Austin, Texas **May 2010**

**Master of Business Administration**, Full-Time Program

- Concentration in Investment Management; Finance GPA 3.8; Overall GPA 3.5; GMAT 680
- Member of Graduate Finance Association, Texas MBA Hedge Fund Organization

**BOSTON COLLEGE, Carroll School of Management** - Chestnut Hill, Massachusetts **May 2004**

**Bachelor of Science in Finance and Marketing**

### EXPERIENCE

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**INVESCO AIM** - Houston, Texas **Summer 2009**

**Summer Equity Analyst**

- Advised Portfolio Manager on investment decisions for the Small-Cap Growth team. Formally presented three software stocks as buy recommendations to the Chief Investment Officer, two of which were purchased in the portfolios.
- Performed deep fundamental research to evaluate potential investments. Included building detailed financial models through financial statement forecasting and determining target prices based on various valuation methods.
- Analyzed economic and market trends to further evaluate stocks. Held weekly calls with consultants to discuss industry trends. Participated in four meetings with company CFOs to address investment concerns and grasp business processes.

**MBA INVESTMENT FUND, LLC** - Austin, Texas **October 2008 - Present**

*Student Managed Investment Fund*

**Portfolio Manager, Consumer Discretionary and Staples Sectors**

- Delivered comprehensive report on the Media industry. Provided analysis of macro-economic environment, industry trends, and company specific fundamentals. Implemented investment decisions based on findings.
- Presented report and recommendations to an investment committee of industry professionals and distinguished faculty.
- Selected by faculty advisors as Risk Manager (team leader) for the Consumer Group. Responsibilities include determining capital allocation strategy, reviewing and approving team pitches, and managing advisor relationships.
- One of eighteen students selected through a formal application and interview process to actively manage value, growth, and fixed-income portfolios with total assets under management of approximately \$11.5MM.

**DAYMON WORLDWIDE** **2004 - 2008**

*Retail Management-Consulting Firm; Specialization in Private Label*

**Business Manager, Staffed at Office Depot (9/07 – 8/08)** - Delray Beach, Florida

- Developed and presented strategic private label marketing campaigns targeted at Office Depot contract customers.
- Managed production of customer catalogs and brochures. Implementations drove private label revenue growth by 12% and overall profitability by 4%. Also managed sampling program, promotional kits, and package insert program.

**Associate Business Manager, Staffed at Office Depot (1/06 – 9/07)** - Delray Beach, Florida

- Supervised 40+ people in the product development and global sourcing operations for the private label business.
- Created business plan proposals to incorporate product into the assortment through complete category management. Developed over 80 items which grew the private label Breakroom business to \$61M; a 900 bps improvement.
- Received departmental award for leading development classes to familiarize new associates with account operations.

**Business Analyst (7/04 – 12/05)** - Stamford, Connecticut

- Created customized category solutions for retailers in the grocery, mass-merchant, drug, and office supply channels.
- Recommendations presented to 20+ customer teams including Kroger, Costco, Supervalu, Safeway and H.E.B.

### ADDITIONAL

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- **CFA Level II Candidate**
- **Computer Skills:** Proficient in Bloomberg, FactSet, Capital IQ, Thomson.
- **Ironman Triathlon** – 2003 Collegiate World Championships. Finished in 35<sup>th</sup> place representing Boston College and raised \$5,000+ for the Dana-Farber Cancer Institute. Competitive triathlete for 8+ years.
- **Citizenship:** United States