

**CORY R. McHATTIE, CFA**  
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**PROFESSIONAL EXPERIENCE**

**DALOOPA | Senior Product Manager** | July 2025 – Present | New York, NY

- Manage Daloopa's API, MCP, Taxonomy products that extend Daloopa's fundamental data to investors through programmatic access, AI-enabled analysis, and cross-company standardization.
- Scaled API product from 3 to 9 accounts (+3x) and drove activity from 608 to 19K monthly events (+3,025%), growing ARR from \$37.5K to \$1.4M by targeting quants, CTOs, and data scientists building systematic workflows.
- Planned and launched Model Context Protocol (MCP) integration with ChatGPT and Claude, enabling LLM-native financial analysis and growing the product to 140 active users and \$100K ARR.
- Defined product strategy and roadmap for Taxonomy product, a standardized metrics framework built with embeddings and LLMs to normalize financial data across 1,000+ companies, securing first paying customers and planning expansion to 4,000+ with calculated metrics and industry KPIs.
- Led partnership to add investment transcripts into API and MCP offerings, launching document access endpoints/tool with keyword search across 10-K/10-Q filings, 8-Ks, presentations, and transcripts.

**SIMILARWEB | Product Manager** | November 2023 – July 2025 | New York, NY

- Led end-to-end development of AI-driven stock research reports by defining product roadmap, aligning cross-functional teams, and managing engineers. The MVP achieved a 90% client satisfaction rating.
- Oversaw Similarweb's highest-margin product for investors: investment signals spanning 400+ metrics across 200+ public companies (>\$5T market cap), designed to accelerate decision-making by forecasting KPIs investors already track.
- Partnered with content and marketing to evolve research reports and webinars into strategic engagement tools, driving \$434K in renewals and \$30K in ARR expansion.
- Defined and launched a unified signals product adopted by two-thirds of clients, improving time-to-insight and enabling a more interactive, insight-led research workflow.
- Built an internal LLM-powered app for domain categorization, automating manual workflows and scaling content generation, boosting efficiency 5x and unlocking new URL-level datasets.

**Plot | Founder** | July 2022 – November 2023 | New York, NY

- Designed and roadmapped Plot, an iOS app integrating calendar, health, and financial data into a unified dashboard aimed at boosting well-being and reducing mental load.
- Conducted market research and 1:1 user interviews, developed product hypotheses, prioritized feature backlog, and iterated based on usage insights.
- Launched on iOS, acquired 500 users, and shut down the app after determining the product was too horizontal to solve a specific problem, informing a sharper approach to problem selection in future work.

**ALLIANCEBERNSTEIN | Research Analyst** | Nov 2021 – July 2022 | New York, NY

- First investment analyst hired for two investment funds (>\$1.3B AUM) focused on high-growth companies.
- Led investment strategy for consumer and industrial sectors, with an emphasis on ecommerce and renewable energy.

**BARCLAYS | Equity Research Associate** | Aug 2019 – Nov 2021 | New York, NY

- Transitioned with the team from Wolfe Research, expanding coverage to 31 consumer stocks (>\$500B market cap).
- Recognized with the “Associate of the Month” award (Dec 2019) for superior collaboration and process improvements.

**WOLFE RESEARCH | Equity Research Associate** | Feb 2017 – Aug 2019 | New York, NY

- Oversaw coverage for 18 consumer stocks (>\$350B market cap), leading full lifecycle coverage initiation on Wayfair (W) and Stitch Fix (SFIX) by creating models, authoring investment reports, and presenting recommendations to clients.

**EDUCATION**

**LEHIGH UNIVERSITY** | Class of 2014 | Bethlehem, PA

- Bachelor of Science, Finance and Accounting; Minor in English

**SOFTWARE & SYSTEMS**

- Product Management: Product Roadmap & Strategy, Agile & Scrum Methodologies, User & Market Research
- Technical: Python, TypeScript, SQL
- Tools: Claude Code, Cursor, Postman, Confluence, Jira, Git