

CORY R. McHATTIE, CFA

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PROFESSIONAL EXPERIENCE

SIMILARWEB | Research Analyst | November 2023 – Present | New York, NY

- Oversee coverage of 500+ investment signals and 200+ stocks with a total market capitalization exceeding \$5T, including GOOGL, MSFT and NFLX.
- Product owner of AI-driven stock research reports for coverage list, integrating company signals, company & competitor datasets (traffic & engagement, conversions, etc.), and LLM technology to scale insights.
- Developed a new product that consolidates investment signals across tickers, enabling faster analysis. The streamlined solution is now clients' preferred method for accessing investment models.
- Lead the development and publication of the monthly 'Quickfire' report and quarterly Earnings Preview webinar, expertly synthesizing emerging trends from Similarweb data with investment theses to provide insightful, timely market analyses.
- Built internal application that leverages an open-source LLM and other key APIs to categorize domains, significantly enhancing data discovery processes, scaling content generation, and automating routine tasks for increased efficiency.

VARIOUS START-UPS | Founder/Consultant | July 2022 – November 2023 | Various

- **Analyst** - Programmed a web application that generates investment research from financial filings and earnings transcripts and lets users discuss research in greater detail with a LLM. This application, built with NextJS, TailwindCSS, OpenAI, and Pinecone, enables users to rapidly assimilate investment information and make informed decisions.
- **Cove** - Acted as a consultant for a startup aiding international businesses in entering the U.S. market. Responsibilities included refining service offerings, identifying target customers, and achieving product-market fit through extensive client and partner interviews, which resulted in the doubling the client count from 15 to 30.
- **Plot** - Developed an iOS application that integrates personal calendar, health, and financial data, providing users with a tailored dashboard to enhance overall happiness. Managed to secure over 500 users and positive feedback, though strategically decided to discontinue the product due to challenges in achieving the desired product-market fit.

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

- First analyst hired for two investment funds managing over \$1.3B in AUM that invested in high growth companies across sectors and global markets.
- Led investment strategy and analysis for consumer and industrial sectors, with a particular emphasis on ecommerce and renewable energy subsectors.
- Implemented a bottom-up analytical strategy to evaluate companies poised to benefit from key trends and determine the risk/reward of the potential stocks.

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

- Transitioned with my team from Wolfe Research to Barclays, leading to the coverage of 31 consumer stocks like Nike (NKE), TJX (TJX) and Lululemon (LULU) with a total market capitalization exceeding \$500B.
- Spearheaded initiative to automate our key research product that tracked brand promotions and their impact on company results that improved the accuracy of product by 25% and reduced the time to compile by 33%.
- Recognized for exceptional performance and contributions, earned the 'Associate of the Month' award in December 2019.

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

- Managed analysis and coverage for 18 consumer stocks with a total market capitalization exceeding \$350B.
- Oversaw the initiation of research coverage on Wayfair (W) and Stitch Fix (SFIX), which entailed building comprehensive company models, drafting detailed initiation reports, and providing informed investment recommendations.

AMERICAN FINANCIAL RESOURCES | Financial Analyst | Jan 2015 – Feb 2017 | Parsippany, NJ

- Led the Financial Planning & Analysis (FP&A) function, while also managing key responsibilities within the Capital Markets and Asset Management groups to ensure financial efficiency and strategic foresight.

EDUCATION

LEHIGH UNIVERSITY | Class of 2014 | Bethlehem, PA

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

SOFTWARE & SYSTEMS

- Significant experience with Python, Typescript, SQL, Swift and VBA, and expert in Microsoft Excel and Bloomberg