

Caleb Tammen

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EDUCATION

The University of Iowa – Tippie College of Business
Master's of Science, Finance and Business Analytics
GPA: 3.8/4.0

Iowa City, IA
Aug 2023 – May 2025

The University of Wisconsin La-Crosse
Bachelor's of Science; Finance and Economics

La Crosse, WI
Jan 2020 – May 2023

CERTIFICATIONS/SKILLS

- CFA L2 Candidate, Securities Industry Essentials (SIE), Python, SQL, MS Office, Financial Modeling, Bloomberg, FactSet

EXPERIENCE

D.A. Davidson Equity Capital Markets
Equity Research Associate

Portland, OR
Incoming – June 2025

- Supported Analysts by researching market and industry trends to produce actionable insights for clients
- Created, maintained, and updated financial models, while creating tables and graphs to clearly illustrate our ideas
- Formulated and issued opinions on securities and discussed findings with Sales & Trading and Institutional clients

Henry Fund
Equity Research Analyst – Healthcare & Consumer Discretionary

Iowa City, IA
Jan 2024 – Present

- Selected through a competitive application process to manage a \$25.8 million student-led equity portfolio
- Conducted thorough industry and company research in the healthcare and consumer discretionary sectors and presented buy/sell recommendations to experienced asset management executives
- Forecasted valuations through discounted cash flow, economic profit, relative valuation, and dividend discount models

Principal Asset Management
Equities Graduate Summer Associate

Des Moines, IA
May 2024 – Aug 2024

- Presented three investment ideas to 20+ Analysts and 5 Portfolio Managers for the large cap, small cap, and emerging market strategies by conducting fundamental analysis and meeting with company management teams, investor relations, and sell-side analysts
- Attended weekly sector updates, daily equities meetings, and portfolio reviews to maintain a well-rounded understanding of domestic and global market news flow impacting Principal's strategies
- Developed a strong understanding relating to the workflow of large equity mandates by working closely with Senior Analysts, the Director of Research, and Portfolio Management Associates for strategies with a net AUM of \$100+ billion

WoodTrust Asset Management
Research and Operations Intern

Wisconsin Rapids, WI
Jun 2023 – Aug 2023

- Conducted in-depth fundamental research and security analysis, yielding six investment theses showcased to the Research and Investment committees, contributing to the enhancement of WoodTrust's portfolio strategies
- Assisted in the creation and upkeep of 20+ tailored presentation materials for client use
- Conducted manager due diligence, evaluating four current and potential investment managers, and contributing to WoodTrust's success through informed decision-making

LEADERSHIP

The University of Iowa – Tippie College of Business
Graduate Student Ambassador

Iowa City, IA
Jan 2024 – Present

- Represented the Master of Business Analytics and Master of Finance programs by sharing personal experiences and insights with prospective students
- Participated in webinars, student panels, and focus groups to provide information and answer questions
- Supported recruitment efforts by reaching out to 50+ newly admitted students and conducting campus tours

The University of Iowa – Tippie College of Business
Graduate Teaching Assistant

Iowa City, IA
Aug 2023 – Present

- Facilitated dynamic and engaging weekly discussion sections for two sections of Introduction to Management, fostering an interactive learning environment for a total of 90 students
- Provided personalized academic support by conducting weekly office hours, addressing students' questions, clarifying concepts, and offering constructive feedback, resulting in improved understanding and performance
- Developed tailored presentation materials for weekly discussion sections and comprehensive midterm and final exam reviews