

Mario Johnson

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EDUCATION

UNIVERSITY OF TAMPA – SYKES COLLEGE OF BUSINESS

Master of Science, Financial Mathematics (STEM-designated)

- Graduate GPA: 3.6

Tampa, FL

Expected May 2027

UNIVERSITY OF TAMPA – SYKES COLLEGE OF BUSINESS

Bachelor of Arts, Economics

- NCAA Men's Soccer

Tampa, FL

August 2020 – May 2024

WORK EXPERIENCE

LENO GROUP OF COMPANIES

Equity Research & Valuation Analyst Intern

Nassau, The Bahamas

May 2026 – Aug 2026

- **Sole equity researcher for the ~\$1 billion AUM investment department**, building equity research function from scratch under direct VP of Investments and COO oversight.
- Independently built bottom-up DCF and Dividend-Discount valuation models on 10 BISX-listed companies across banking, insurance, consumer, telecom, and healthcare.
- Analyzed financial statements, earnings quality, and capital structure to assess intrinsic value and downside risk.
- Incorporated Bahamian macro factors into discount rate construction and country risk premium measurement.
- Stress-tested each thesis with sensitivity analyses.
- **Presented coverage recommendations directly to the VP of Investments and COO with no intermediate review.**

ACCURATE WEALTH MANAGEMENT

Trading & Structured Products Analyst

Tampa, FL

May 2024 – Aug 2025

- Analyst on a four-person desk managing a \$350M equity-linked structured-note portfolio (firm AUM ~\$2 billion).
- Contributed to portfolio growth from **\$55M to \$300M AUM** (over 6x increase) over 15 months.
- Sourced equities and converted fundamental research into funded client allocations. Built operating models including DCF on U.S. large-caps (>\$10B market cap) as note underliers.
- Ran competitive bids across every major U.S., Canadian, and European issuer (JPMorgan, Goldman Sachs, BofA, Citi, RBC, BNP Paribas, Barclays, Société Générale, Santander) to win best-of-market terms.
- Produced daily and weekly performance reporting on portfolio and note-level metrics.
- Presented to senior management and HNW clients, translating payoff mechanics into plain-language investment logic.

ACCURATE WEALTH MANAGEMENT

Investments Co-Op

Tampa, FL

Jan 2024 – May 2024

- **Selected as 1 of the 2 students offered a full-time role after graduation.**
- Rotated across insurance, advising, estate planning, tax planning, and trading to build a firm-wide view of a ~\$2 billion RIA's operations and product set.
- Executed client buy and sell orders on Schwab and Fidelity and rebalanced portfolios to each account's target allocation.

SKILLS, TOOLS & INTERESTS

Valuation & Modeling: Three-statement modeling, DCF, Dividend Discount Model, Residual Income Model, Comparable Companies, sensitivity & scenario analysis

Software & Tools: Microsoft Excel (Pivot Tables, XLOOKUP), PowerPoint, Word, SEC EDGAR, SEDAR+, Schwab, Fidelity

Sector Coverage: U.S. and Canadian small/micro-cap equities; technology, healthcare, consumer, telecom, industrials

Interests: Soccer, golf, Muay Thai, pickleball, weightlifting and cooking