

FELIPE OÑA

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EDUCATION

Miami University

B.S. in Finance & Business Data Analytics (STEM), Honors College

Oxford, OH

Expected December 2026

Honors: President's List, Excellence Scholarship, FSB Honors (top 1.5%)

GPA: 3.6/4

Certifications: FINRA Securities Industry Essentials (SIE), Series 66 (anticipated)

PROFESSIONAL EXPERIENCE

Hungry Pig Capital Group

Investment Analyst

Ohio

January 2026 – Present

- Evaluate private equity and CRE opportunities, conducting due diligence on target companies, assets, leases, and deal structures.
- Build financial models and valuation analyses — including DCFs, pro-forma cash flows, debt schedules, amortization tables, and return scenarios — to support acquisition and investment decisions.
- Developed allocator research and fundraising intelligence for CRE capital formation, screening 75–100+ RIA, wealth management, and family office prospects by AUM, alternatives exposure, and \$200K–\$2M target check size.
- Created a prospecting framework to prioritize high-fit allocators, incorporating target check bands, Form ADV–based research, real estate allocation signals, sponsor conflicts, and outreach rationale for firm leadership.

Red Brick Capital

Junior Portfolio Manager

Ohio

August 2025 – Present

- Co-manage a \$2M AUM portfolio, securing three new high-conviction positions through 150+ hours of valuation and risk analysis.
- Produced 6+ research reports supporting \$100K+ in allocations using Bloomberg and FactSet, balancing risk-return targets.
- Trained directly by senior portfolio managers and investment professionals from Morningstar, Goldman Sachs, UBS, and Baird.

J.P. Morgan

Commercial & Investment Banking, Middle Market & SI — Summer Analyst

Texas

June – August 2025

- Reduced manual reporting time by 85% by engineering an automated Excel–Essbase tool that streamlined financial reporting and client-coverage workflows for a team of senior bankers.
- Identified seven high-impact growth strategies projecting \$50M+ in potential revenue by analyzing \$343M in M&A, ECM, and DCM activity across three regional hubs.
- Supported 400+ high-value client relationships by producing 30+ executive-level pitch decks and dashboards in Essbase and Cognos to accelerate prospecting and market-trend analysis.
- Authored four Earnings Management Reviews analyzing \$297M+ in YTD revenue and key KPIs (ROE, NIAC) across 100+ client segments to guide senior leadership's capital allocation decisions.

J.P. Morgan

Data for Good Hackathon — Analyst

Texas

April 2025

- Delivered a national expansion roadmap projecting a 40% revenue increase across three new regions by identifying high-impact targets with SQL, Python, and Tableau on a 3M+ record dataset.
- Architected a scalable customer data pipeline, reducing projected acquisition costs by 15% for a three-year growth strategy.
- Translated complex findings into Power BI dashboards adopted by senior leadership.

LEADERSHIP & ACTIVITIES

Miami Equity Research Club

President & Founder

Oxford, OH

February 2023 – Present

- Direct 60+ analysts managing \$2M AUM across eight virtual portfolios, setting portfolio strategy and leading 80+ technical workshops on financial modeling, equity valuation, and market analysis.
- Scaled active membership by 1200% through strategic rebranding and digital marketing, curating dozens of professional networking events to pipeline members into top-tier finance careers.

Asset Management Club

Portfolio Analyst

Oxford, OH

- Supported investment decisions for a \$45,000+ portfolio by conducting equity research, portfolio analysis, and diversification.

Phi Chi Theta

International Chair

- Organized two professional business summits for 4,000+ students while managing a \$5,000 budget and coordinating event logistics.

Miami University

Resident Assistant & Teaching Assistant

Oxford, OH

- Mentored 400+ residents and students, strengthening leadership, communication, and relationship-management skills.

SKILLS, LANGUAGES & ADDITIONAL

Technical: Advanced Excel, PitchPro, SQL, Python, Tableau, Power BI, Bloomberg Terminal, FactSet

Languages: Fluent in English and Spanish (bilingual) **Affiliations:** ALPFA (Association of Latino Professionals For America)