

Luke Lawrence Cavallo

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EDUCATION

Texas State University, Honors College, McCoy College of Business - Texas State GPA: 3.80 San Marcos, TX
Major: Bachelor of Business Administration, Finance Expected Graduation: May 2027
Scholarships: President's Honor Scholarship | 33 ACT | 1430 SAT |
Dean's List: Fall 2024, Spring 2025 (President's List)

EXPERIENCE

Independent Investment Research Project San Marcos, TX
Portfolio Manager January 2025 – Present

- Outperformed the S&P 500 by 21% from February to August 2025, generating a 30.78% return in the period
- Conducted fundamental and technical analysis to evaluate stocks using financial modeling techniques (DCF, CAGR, Ratio Analysis)
- Developed an Excel-based valuation model and screened stocks using financial metrics to identify investment opportunities

Luci Personal Finance Remote
Market Research Intern February 2025 – July 2025

- Developed a data-driven social media strategy by analyzing platform algorithms, audience engagement, and market trends
- Reached tens of thousands of people across YouTube, TikTok, and LinkedIn to maximize brand effectiveness

Woodland Hills Swim Team Houston, TX
Head Coach May 2024 – July 2025

- Coached 150 swimmers (ages 4-18), led team to undefeated division championship and 2nd place in All Stars Invitational
- Managed a team of 3 assistant coaches, organizing initiatives to improve swimmers' times and reduce disqualifications

Kids in Action Childcare Houston, TX
Daycare Teacher May 2023 – August 2024

- Developed leadership, organization, and crisis management skills while overseeing 20+ children in a fast-paced environment

LEADERSHIP & PROFESSIONAL DEVELOPMENT

McCoy Relational Values Leadership Program San Marcos, TX
Program Member December 2024 – April 2025

- Participated in the McCoy College of Business Relational Values Leadership program, a program centered around interpersonal relationships and conflict resolution skills

Financial Management Association San Marcos, TX
Association Member January 2025 – Present

- Engaging with peers and professionals through weekly meetings, guest speeches, and community programs in order to gain financial expertise and develop professional skill sets

Student Economic Association San Marcos, TX
Association Member January 2025 – Present

- Participating in research and discussion centered around the current state of markets and industrial trends
- Attending seminars from expert guest speakers, including seasoned economists, accountants, bankers, and financial advisors

Society of Computational Finance San Marcos, TX
Association Member January 2025 – Present

- Engaging in projects and seminars leveraging AI and machine learning for financial modeling and quantitative analysis
- Gaining exposure to Python, Tensorflow, and quantitative finance methodologies

OTHER SKILLS & INTERESTS

Languages: Spanish (Literate and communicable)

Licenses and Certifications: Securities Industry Essentials (SIE) Exam - FINRA, CPR and Lifesaving Certifications

Programs: Relational Values Leadership Program, Texas State University Honors College

Interests: History, Philosophy, Mathematics, Business Development and Entrepreneurship, Soccer, Boxing, MMA, Online Marketing and Content Creation (Youtube Channel: www.youtube.com/@LuciPersonalFinance)

Software: Microsoft Office Suite, Google Workspace, OpenAI and Anthropic, POS Systems, OBS Studio