Daniel Roytman

199 Thornway Avenue, Vaughan, ON
+1 (647) 830-3784 | royt4100@mylaurier.ca

Education

Lazaridis School of Business, Wilfrid Laurier University — Waterloo, ON
Bachelor of Business Administration - Finance *(Double Degree)* — Graduation: May 2020
- *Current Cumulative GPA:* 11.6/12.0 (3.96/4.00)
- *Activities:* JDCC Debate team, Laurier Investment and Finance Association

Wilfrid Laurier University — Waterloo, ON
Bachelor of Arts in Financial Mathematics *(Double Degree)* — Graduation: May 2020
- *Current Cumulative GPA*: 11.6/12.0 (3.96/4.00)

Professional Experience

Goldman, Sachs & Co. — Los Angeles, CA
Incoming Summer Investment Banking Analyst, West Region Advisory — Summer 2019

Altas Partners — Toronto, ON
Incoming Private Equity Analyst — Winter 2018

RBC Capital Markets — Toronto, ON
Co-op Investment Banking Analyst, Mergers & Acquisitions — Jan. 2018 – May 2018
- Responsible for working with all industry groups to refine model assumptions and create support material for transactions
- Constructed operating and valuation models including LBO, DCF, accretion/dilution, comparable company and precedent transactions analyses to understand the impact of mergers, acquisitions and divestitures

Selected Transaction Experience:

Canadian Real Estate Investment Trust (TSX: REF-U) ~C$6.0 billion sale to Choice Properties – Exclusive Sell-side Advisor
- Created several segments of the client deck, including analyses on transaction multiples, peer performance, industry research, and shareholder analysis
- Supported model construction by performing ad-hoc analyses, including an analysis of various prices and sensitivity analyses
- Created daily market updates for the client, including a share arbitrage analysis, peer relative performance and share trading summaries
- Compiled data on precedent transactions to determine acquisition terms, including break fees and reverse break fees

Proposed sale of a ~C$1 billion business segment of a distributor – Exclusive Sell-side Advisor (Terminated)
- Constructed valuation analyses including LBOs and DCFs of both the consolidated business and each of its business segments
- Worked with coverage teams to come to views on model assumptions for multiple scenarios and value drivers
- Aided in the construction of the CIM sent to a list of potential buyers

Asset Manager looking to explore opportunities in the United States – Exclusive Buy-side Advisor (Ongoing)
- Created the financial model guiding purchase price and bid decisions for the client
- Modeled alternative financing opportunities, and implications of these opportunities on the IRR
- Sensitized operational, transactional and financing drivers to determine optimal financing structure and drive client presentations

OMERS Capital Markets — Toronto, ON
Co-op Analyst, Fixed Income — May 2017 – Aug. 2017
- Built an equity derivative modeler encompassing options, futures, and futures on options, which led to portfolio adjustments to optimize portfolio convexity
- Built a custom credit (CDS) index options model to value dealer offerings on CDS indices such as the IBoxx and CDX series
- Consistently contributed to investment idea generation and conducted research
    - *Example:* Research led to an investment in EM equity vs. local currency debt ETF and an outperformance of 5.02%

Extracurriculars

ACIIC — Toronto, ON
VP of Education (Canada), Previous: Analyst — Sept. 2017 – Present
- Responsible for the creation and execution of lessons related to modelling, recruiting and other relevant finance topics

Laurier Student Investment Fund (~$1,000,000) — Waterloo, ON
Portfolio Manager, Previous: Research Analyst — Sept. 2017 – Present
- Responsible for the management of a ~$1,000,000 student fund
- Initiated coverage on Sleep Country Canada by remodeling the company and completed a re-evaluation of the initial pitched thesis
- Pitched Kingfisher PLC (LON: KGF) as a strong buy and short Lumber Liquidators (NYSE: LL)

Awards, Activities, Skills and Certifications

Awards: *1st Place:* TD Securities Mergers & Acquisitions Case Competition (2017), National Investment Banking Competition (NIBC) Finalist (2017), Wilfrid Laurier University President's Gold Scholar (2015 – Present)
Activities: Krav maga, boxing, tae-kwon-do black belt, guitar, camping, and a Raptors full time fan
Skills: Technically proficient in Bloomberg, Capital IQ, Excel, VBA, PowerPoint
Certifications: Bloomberg Proficiency Certification (PRISM Resources) (Jun. 2016)