Gurjas Singh Batra, CFA

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Experienced fixed income trader focused on relative value modelling, trade lifecycle management and macro research. Master of Finance and CFA charterholder, proficient in Bloomberg, Excel VBA, Python and R, translating macro developments into trade ideas.

EDUCATION

CFA Charterholder Nov 2026
Cleared all three CFA exams on the first attempt.

DeGroote School of Business, McMaster University Aug 2023 – Dec 2024
Master of Finance, *CGPA 3.9/4.0* *Hamilton, ON*

- Entrance Scholarship: Top 5% among incoming cohort
- Graduate Teaching Assistant – FINANCE 602, Economics of Financial Decisions
- Relevant coursework: Financial Theory, Computational Finance, Economics, Financial Derivatives

Shaheed Sukhdev College of Business Studies, University of Delhi Sep 2018 – Aug 2021
BBA, *Financial Investment Analysis* *Delhi, India*

WORK EXPERIENCE

Fixed Income Trader Jan 2025 – May 2026
Futures First (Hertshten Group) *Montreal, QC*

- Executed and managed US and CAD rates and Treasury futures across CME and Montreal Exchange on a US$400,000 portfolio, delivering 2.5% per month returns
- Applied execution algorithms incorporating relative-value pricing models, statistical arbitrage concepts, market microstructure and technical analysis
- Traded SOFR, Fed Funds, UST and CORRA futures, using hedging and position sizing to control exposure
- Processed 55 trades per week on average from capture through settlement, working with Operations and Risk to validate trade data and regulatory compliance
- Reconciled trade, cash and collateral positions daily, keeping books and records accurate
- Built relative value and curve analysis on US rates to inform positioning, by developing in-house pricing models and macro analysis on US repo and dollar-funding markets

Lab Assistant Oct 2023 – Dec 2024
DeGroote Trading Centers, McMaster University *Hamilton, ON*

- Trained 15 students per week on Bloomberg and LSEG terminals for equity, currency and ESG analysis projects
- Raised the accuracy of student financial models by approximately 10% through hands-on troubleshooting and process guidance

Trade Support – Research Analyst Nov 2021 – Jul 2023
ASG LLP *Delhi, India*

- Supported asset allocation across equities and derivatives for 20+ client accounts (US$300,000+ AUM), outperforming the benchmark by 2% per annum
- Analyzed economic indicators in Python and Excel to inform trade and allocation decisions
- Streamlined senior management reporting in PowerPoint, saving approximately 30 minutes of company time per day
- Built client-facing pitchbooks in PowerPoint and Power BI for onboarding and reviews across 13 accounts

Financial Analyst Jul 2021 – Nov 2021
Ernst & Young (EY) *Delhi, India*

- Evaluated 10+ target companies through financial statement analysis and DCF modelling to inform valuation
- Built Excel financial models, improving forecast accuracy by 15% and cutting data preparation time by 20%
- Presented financial risk findings to senior management and refined valuation models to improve reliability

PROJECTS

Weekly Earnings Macro Report: Turns earnings calls into ranked macro takeaways benchmarked to peers and Fed data
Fed Speech Analysis: Analyzes Federal Reserve speeches to extract key policy messages and generate insights

TECHNICAL SKILLS

Financial Data: Bloomberg Terminal, Refinitiv Eikon LSEG
Programming & Analysis: Python, R, SQL, Excel VBA, AI Skills & Agents
Visualization & Reporting: Power BI, Tableau, PowerPoint
Macro & Research: Macro research, Fed communication
Languages: English (Native), French (Bilingual; TCF Canada certified)