

DavidLucey

Founder, Redwall Analytics

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About me

Data literate executive combining advanced analytics with deep financial markets and investment domain experience

Current Activities

2018 - present Independent Consultant

REDWALL ANALYTICS

Old Greenwich, CT

- Building portfolio of analytics projects about education, real estate, transportation, markets and government using open public data
- Collaboration on Mass municipal annual financial report PDFs led to pro bono team effort to scrape all US cities with Center for Municipal Finance

Common Tools

R, Python, SQL, Command Line, Regular Expressions, Entity Resolution, Web/PDF Scraping, Shiny, Tableau, Github, AWS, Docker.

Project Links

- 2020 Parsing City PDF CAFRs with pdftools, tabula and Textract
 - Extracted key elements from 150 financial statement PDFs using OCR tools
- 2020 Learning SQL and Exploring XBRL with secdatabase.com
 - Queried from and Analyzed 200 million row SEC Edgar XBRL database
- 2020 Using drake for ETL and building Shiny app for CT real estate sales
 - Cleaned 1 million rows of public real estate sales for display in Shiny App
- 2020 Evaluating American Funds Portfolio Over Three Market Cycles
 - Modeled weekly performance of portfolio versus custom-built benchmark
- 2020 Tracking Research spending by 700 Listed US Pharma Companies
 - Retrieved JSON API data to examine aggregate industry research spending over time
- 2020 Accessing XBRL Financial Statements with R
 - Tutorial on how to scrape SEC Edgar with open-source R tools
- 2019 Replicating Yankee Institute Risk Score Over 15 Years
 - Extracted key financial elements from annual Connecticut MS Access DB's to build an interactive Shiny app calculating town vulnerability over time

Recent Education

2017 - 2018 Master of Science, Business Analytics (MSBA) NYU Stern School of

Business

New York, NY

- Intense 15-month program (NYU MSBA Course Index) to teach senior executives to 'extract wisdom from data'
- Capstone built recommender system for online Met Museum of Art Store
- R and Python for data wrangling, visualization and statistical modeling
- Student Intern, ALPINE DATA, LLC. Assist business development for ML SaaS platform sold to large financial institutions

Past Education

- 1989 - 1994 Master in Business Administration (MBA), Finance NYU Stern School of Business
New York, NY
- Independent research project on post-1980s Japanese equity warrant valuation
 - Work-study M.S. in Accounting program sponsored by KPMG
- 1985 - 1989 Bachelor of Science (BS), Physics Haverford College
Haverford, PA
- Thesis simulating electric feedback loops in C
 - Co-Captain of Middle-Atlantic Conference championship soccer team

Past Experience

- 2012 - 2016 Director Head of Latin American/CEEMEA Emerging Equity Research Sales BARCLAYS CAPITAL
New York, NY
- Built generalist 3-person Emerging Markets equity sales desk (less than half competitor headcount) by sharing multi-regional knowledge and cross-selling strategies
 - Maintained \$10M of team sales credit until firm exited Emerging Market geographies
- 2008 - 2012 Vice President Emerging Markets Equity Research Sales GOLDMAN SACHS
New York, NY
- Recruited for Emerging Markets brand extension, which led to rise from unranked in CEEMEA region to #7 for research and market share at 7-8% (\$17M of team gross revenues)
- 1998 - 2008 Executive Director Emerging Market Equity Research Sales UBS SECURITIES
New York, NY
- Contributed to building of CEEMEA Emerging Equity research franchise recognized by Institutional Investor Magazine as the #1 product for 5 years running

Past Certifications

- 1993 Certified Public Accountant. Lapsed
1995 Chartered Financial Analyst. Active