Brandon Leon

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EXPERIENCE

Director (Independent Consultant)
Apr 2026 – present

New Century Capital Partners · investment banking platform · Santa Monica, CA (remote)

- Investment research and analytical support within an SEC-licensed broker-dealer (FINRA/SIPC): sector and company-level models, DCF, comps and precedent-transaction analysis, synthesized into research-grade deliverables.
- Fundamental research and due diligence across coverage sectors to support thesis development and transaction-related diligence.
- Mentor junior analysts and interns on equity-research methodology, three-statement modeling and valuation frameworks; review research output before publication.

Independent Equity Research
Mar 2026 – present

bpleon.com

- Single-name coverage across semiconductors and AI infrastructure, energy and power, where each note carries a published rating, a target and the specific number that would prove it wrong, graded in public on the track record page.
- Weekly macro outlook covering rates, positioning and cross-asset implications; every call revisited the following week.
- Built the site's free modeling toolkit: DCF, trading-comps and LBO templates with worked examples, plus in-browser valuation calculators.

Investment Analyst
Aug 2023 – Feb 2026

Hidataics · government contracting & infrastructure · Leesburg, VA (remote)

- Built and maintained three-statement models, cash-flow projections and KPI dashboards; financial-statement analysis supporting executive decision-making.
- Project-level variance analysis and margin-trend review to improve forecast accuracy across a multi-contract portfolio.

Junior Investment Analyst
Jun 2022 – Jul 2023

El Toro Capital Management · growth equity · Santa Monica, CA

- Equity research and valuation (DCF, trading comps, precedent transactions) across software and digital-media verticals supporting investment coverage and transaction recommendations.
- Screened 3,000+ companies across cybersecurity, digital media and software; developed sector-level theses and proprietary coverage frameworks.
- Scenario and sensitivity analysis on company financials, synthesized into research-grade memoranda and committee presentations for senior management.

Portfolio Manager, Asset Allocation Portfolio
Jun 2022 – Jun 2023

Titan Capital Management · Cal State Fullerton · Fullerton, CA

- Constructed and actively managed a risk-controlled, low-correlation strategy on a ~$1MM multi-asset portfolio.
- Security valuation and investment research; authored monthly performance-attribution reports for the advisory board and clients.

Investment Analyst, CFA Institute Research Challenge
Jun 2022 – Jun 2023

Representing Cal State Fullerton

- Advanced to the Global Finals representing the Americas region after winning the Local, Sub-regional and Regional rounds, among 6,300+ students from 1,100 universities.

EDUCATION

2023 MBA, Finance · Cal State Fullerton, College of Business and Economics

2019 BA, Sociology; Minor in Statistics · University of California, Irvine

CERTIFICATIONS

2025 Passed Level I of the CFA Program (May 2025)
Securities Industry Essentials (SIE)
Wall Street Prep — Financial Statement & DCF Modeling
Bloomberg Market Concepts (BMC)

SKILLS

Equity research, Financial statement analysis, Valuation, DCF / comps / precedent transactions, Three-statement modeling, Scenario & sensitivity analysis, Budgeting & forecasting, Variance analysis, Advanced Excel (pivot tables, VBA), Bloomberg Terminal, FactSet, Capital IQ, PowerPoint, SQL (basic), Python (research tooling)