



## TIM REZVAN, CFA

MANAGING DIRECTOR

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### EXPERTISE

- ✓ Oil & Natural Gas Commodities Market
- ✓ Oil & Gas Derivatives
- ✓ Equity Research in Natural Resources
- ✓ Distressed Debt/Equity Analysis (focus on Energy Sector)
- ✓ Financial Statement Analysis (focus on Energy Sector)
- ✓ Portfolio Management (focus on US Equities)

### EDUCATION

**New York University  
Stern School of Business**  
MBA

**College of William & Mary**  
BBA, Finance; also completed degree requirements for BA, Spanish

### EMPLOYMENT HISTORY

**Oppenheimer & Co. Inc.**  
Managing Director, Energy Research  
2018-2020

**Mizuho Securities USA**  
Managing Director, Energy Research  
2016-2018

**Sterne Agee**  
Managing Director, Energy Research  
2010-2016

**BlackRock**  
Director, Quantitative Research Analyst  
2003-2009

### OTHER

**CFA Institute**  
Chartered Financial Analyst (CFA)

**FINRA** Series 7, 63, 66, 87 license-holder

**Tim Rezvan, CFA has over twenty years of experience in equity research, in both the asset management and sell-side equity research industries, working for leading financial institutions such as BlackRock and Oppenheimer. His fundamental Energy research expertise encompasses equity securities in the Exploration & Production (E&P) industry, HY debt securities, oil and natural gas commodities, and commodity derivatives. He has expertise in E&P financial**

Mr. Rezvan, for the past 10 years, has been a publishing sell-side equity research senior analyst, working for Sterne Agee, Mizuho Securities USA, and, most recently, Oppenheimer & Co. His research coverage focuses on the Exploration & Production (E&P) industry, but also touches on other Energy industries, including MLPs, Refiners and Oil Services. He has experience working with companies on capital raises (IPOs, secondary equity issuances, preferred equity, HY debt), in addition to analyzing equity and HY debt securities and the oil and gas commodity markets. He has marketed his work with investment clients in the US, Canada, Europe, Japan, and Israel.

Priorly, Mr. Rezvan as a director and quantitative research analyst at BlackRock had sector coverage responsibilities for the Energy sector with an investment team that successfully managed over \$6 billion in institutional accounts, mutual funds and closed-end funds from 2003-2009 using a quantitative model with a fundamental overlay to manage equity portfolios. His work included back-testing and validating quantitative signals to assist in portfolio construction, as well as managing day-to-day data processing for the global alpha models.

Mr. Rezvan has frequently been quoted in The Wall Street Journal, CNBC, Bloomberg, and Fox News, in addition to other outlets. He holds a BBA (Finance) from the College of William & Mary, where he also completed the degree requirements for a BA in Spanish. He also holds an MBA from New York University's Stern School of Business. He has been a CFA charterholder since 2001.