CYNTHIA R. AXELROD, CFA
9 Cottonwood Court, Lafayette Hill, PA 19444
(610) 290-3037
cindyaxelrod@comcast.net
http://www.linkedin.com/in/cynthiaraxelrodcfa

CAREER SUMMARY

Senior Securities Analyst and Portfolio Manager, specializing in consumer staples and healthcare industries, interested in leveraging extensive experience in investment and portfolio strategy recommendations. Reputation as an innovative, resourceful team player skilled in analysis and presentation of investment strategies to clients, portfolio managers and independent money managers. Speak regularly with executive decision makers to gain detailed insight into firm's prospects. Sharp focus on anticipating future events that influence revenues, margins, operating and net income, and stock appreciation.

SPECIFIC AREAS OF EXPERTISE

- Investment Analysis
- Portfolio Management
- Client Presentations
- Asset Management
- Relationship Building
- Value and Growth Investment Disciplines

PROFESSIONAL EXPERIENCE

Glenmede Investment Management, **LP** Philadelphia, PA
Vice President/Securities Analyst, 2002-2012

- Applied seasoned experience in small/mid/large capitalization stocks and introduced new equity ideas outside the S & P 500 universe to portfolio managers. Devised an investment framework/thesis for stocks that outperformed respective benchmarks.

- Performed financial screening methodologies, incorporating market capitalization, trading liquidity, revenue and earning estimates and trends, balance sheet, income statement and cash flow analysis. Interviewed company management as well as competitors, customers and suppliers to discover information not readily available.

- Developed comprehensive set of quantitative and qualitative financial models that included income, balance sheet and cash flow analysis, as well as pipeline productivity and patent exposure for pharmaceutical stocks. This allowed clients with outsized investments in pharmaceutical companies to more fully appreciate investment risks and prompted them to rebalance their portfolio and diversify into other profitable market segments.

- Conducted and prepared well-informed investment decisions by portfolio managers and their clients by interviewing C-Level executives and sell side analysts about what they believed were the most challenging issues facing the health care and consumer staples industries. Distilled and analyzed information, prepared and updated easy to understand quarterly reports presented at formal/informal meetings with internal and external clients**.**

- Recognized need for central information database for tracking/distribution of equity investment information, thesis and updates. Initiated development, interviewed portfolio managers and marketing personnel and collaborated with IT staff to develop and implement easy access of internal information database for thorough presentation to clients.

Black Rock Financial, Wilmington, DE
Vice President, Co-Manager of Small Cap Value Fund, 2000-2002

- Co-managed $2B small capitalization mutual fund and served as healthcare/consumer sector specialist for $1B mid cap fund using value investment disciplines.

- Initiated buy/sell/hold ideas for direct sector responsibilities and for junior team members. Devised screening methodology to discover undervalued small/mid cap securities on an ongoing basis to develop portfolio structure. Screened on trailing 12 month earnings, forward 12 month estimates, price to cash flow, and free cash flow yield using balance sheet, income statement, and cash flow analysis.

- Conducted interviews with managements to evaluate strength of business model relative to stock valuation for ultimate investment. Readied stable of potential investment ideas.

1838 Investment Advisors, LP (Acquired by MBIA, Inc.) Radnor, PA
Principal, Co-Manager of Small Cap Value Fund, 1995-2000

- Co-managed small capitalization portfolio and mutual fund, generated buy/sell ideas, educated and persuaded clients resulting in asset growth of $2B utilizing value investment disciplines.

- Constructed quantitative screening methodology using FactSet database; augmented low price to earning valuation screen with price to book, price to cash flow, positive earnings revision, corporate share buyback, insider purchase activity, return on assets and return on equity. Developed user friendly screens that were available at anytime to identify timely and objective buy ideas. Distilled initial investable universe of 2000 stocks, to a manageable 200.

Friess Associates, Greenville, DE
Security Analyst, Generalist, 1992- 1995

- Conducted growth and momentum investment strategy coupled with fundamental analysis for Small/Mid/Large Cap mutual funds and client assets.

Provident Capital Management, (now known as PNC Advisors), Philadelphia, PA
Assistant Vice President, 1985-1992

- Advanced from Trainee to Co-Portfolio Manager generating buy/sell/hold investment ideas for institutional clients and internally managed mutual funds. Evaluated suitable investments of small cap equities and IPOs. Met with corporate management teams of publicly traded companies regularly to keep abreast of changes in fundamental business activities.

EDUCATION

Drexel University, Philadelphia, PA
Master of Business Administration, Concentration in Investment Management
Bachelor of Science in Finance

PROFESSIONAL DEVELOPMENT

Chartered Financial Analyst, 2000
Guest Lecturer, Fox School of Business and William C. Dunkelberg Owl Fund, Temple University
Various interviews with Media
Internally sponsored seminars on Client Relationship Skills
Internally sponsored seminars on Speaking with the Media

AFFILIATIONS

CFA Society of Philadelphia
CFA Institute
Girl Scouts of Southeastern Pennsylvania, Investment Sub-committee