



Bilal Costa

Associate

Private equity and investment banking professional with 6 years of experience monitoring up to 23 portfolio companies per role, coordinating third-party advisors across acquisitions and divestitures, and building operating models in Excel and Bloomberg. Generated a 27.6% net IRR on a realized healthcare investment by leading quarterly operating reviews and recommending pricing adjustments that lifted margins over a 26-month hold period. Prepares quarterly portfolio review materials covering \$296M in aggregate enterprise value across consumer services, light industrial, and healthcare sectors.

CONTACT INFORMATION

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EDUCATION

BSBA in Finance and Banking
University of Missouri, Columbia, MO
2016 - 2020

KEY SKILLS

- Excel
- Bloomberg
- LBO Modeling
- Discounted Cash Flow Analysis
- M&A Execution
- Portfolio Monitoring
- Due Diligence Coordination
- Cash Flow Waterfall Analysis
- EBITDA Bridge Analysis
- Data Room Management

PROFESSIONAL EXPERIENCE

Associate I 2023 - Present

Osage Hollow Capital Partners, Kansas City, MO

- Monitored 23 portfolio companies across consumer services and light industrial sectors, tracking monthly KPIs in Excel and presenting variance analyses to the investment team within 72 hours of each reporting cycle.
- Coordinated 11 third-party advisors including legal counsel, accounting firms, and environmental consultants during a platform acquisition, completing all workstreams 9 days ahead of the target close date.
- Generated a 27.6% net IRR on a realized healthcare investment by leading quarterly operating reviews and recommending pricing adjustments that lifted margins over a 26-month hold period.
- Prepared quarterly portfolio review materials covering \$296M in aggregate enterprise value, consolidating financial data from 23 companies into standardized reporting templates.

Analyst I 2021 - 2023

Blackjack Creek Equity Group, St. Louis, MO

- Monitored 14 portfolio companies on a weekly basis using Excel dashboards, identifying 3 underperforming assets that required operational intervention within 45 days of trend detection.
- Coordinated 8 third-party advisors during a sell-side process, managing document requests and scheduling to keep the transaction on a 94-day timeline from engagement to close.
- Supported investment return analysis showing a 20.9% gross IRR across 4 realized exits by maintaining detailed cash flow waterfalls and distribution schedules.
- Drafted preliminary investment memoranda and compiled market data using Bloomberg for 6 prospective transactions during a 12-month period.

Investment Banking Analyst I 2020 - 2021

Prairie Trace Advisory LLC, Columbia, MO

- Coordinated 5 third-party advisors including valuation consultants, tax specialists, and legal teams on 2 middle-market M&A engagements.
- Assembled data rooms containing over 340 documents per engagement, reducing average information-request turnaround from 4 days to 1.5 days.

- Constructed operating models in Excel for prospective targets, completing initial drafts within 48 hours of receiving management financials.