

ZHANG Xiaoyu (Catherine)

88 Tat Chee Avenue, Kowloon Tong, Hong Kong

Mobile: +852 54871558 +86 14714425006

Email: zhangxy923@126.com



EDUCATION

City University of Hong Kong

Master of Science in Financial Services

Hong Kong

Aug 2016 - Nov 2017

- **Major Courses:** Investment, Derivatives and Risk Management, Corporate Finance, Financial Statement Analysis, Fixed Income Securities, Credit Risk Management.

Capital University of Economics and Business

Bachelor of Science in Finance

Beijing, China

Sep 2008 - Jun 2012

- **GPA:** 3.64 / 4.30
- **Honors:** RenMin Scholarship, 7 times (Top 10%).
- **Major Courses:** Investment Banking, Securities Investment Fund, Financial Model Design, Accounting, Economic Law.

The University of Hong Kong

Exchange Student

Hong Kong

Jul 2011 - Aug 2011

- **Grade:** A
- **Major Courses:** Financial Analysis, Marketing Management, Writing.

WORK EXPERIENCE

Dongxing Securities

Equity Research Intern, Computer Team

Shenzhen, China

Jan 2017 - Now

- Follow 178 stocks in Computer industry; focus on firms and industry news and hot topics, including **Consumer Finance, AI and Internet+**. Collect and analyze industry and firms' information; get financial data by **Wind** and **Bloomberg**.
- Update data, draw charts for weekly journal; meeting records; financial statement analysis and financial modeling.
- Assist analyst write 2 firm reports (300078.SZ & 300609.SZ); 2 industry reports (RFID and Consumer Finance); M&A research reports (002668.SZ, 300061SZ, 002537SZ, 600093SH).
- Have meetings with the buying party; company research.

Roland Berger Strategy Consultants

Part-time Assistant, Financial Services Department

Shanghai, China

Sep 2016 - Nov 2016

- Provided strategy service for Shanxi Securities: assisted in desk research and commercial due diligence (CDD); designed models to optimize department functions; tested feasibility and measurability; report writing and presentation to manager and clients.
- Participated in department establishment case in a top security firm: information research, data analysis and warm/cold call interview to analyze operation of Internet Finance Department; assisted in organization structure modeling.

Bank of China

Clients Manager, Individual Financial Department

Beijing, China

Sep 2012 - Jun 2016

- Research on fund, foreign currencies and gold; member of the Investment Workshop with personal responsibility for product analysis; preparation of monthly marketing report.
- Learned quickly about bonds and new products; trained on-sale products, risks and processes for a group of 9 people.
- Financial Advisory for retailing customers. Developed relationships with affluent and high-net-worth individuals; advising in their portfolio strategy and liquidity management. Traded 3 million funds, 5 million self products and 0.5 million insurance.

PROJECT EXPERIENCE

Abbott's Financial Analysis (NYSE:ABT)

Team Leader

Hong Kong

Mar 2017 - Apr 2017

- Analyzed 2016 annual report; Valuation; Competitor Analysis; Industry Analysis; Writing analysis report and presentation.

LEADERSHIP EXPERIENCE

Student Union

Vice President

Beijing, China

Sep 2009 - Jul 2010

- Organized the first Financial Professional Competence Contest (Held consecutively for 7 years), invited outstanding bank staff as mentors. More than 200 students attended.
- Organized the Books Market, about 1,000 books were traded throughout the university and 300 books were donated to a Hope Elementary School.

SKILLS & INTERESTS

- **Languages:** IELTS: 6.5, CET-4: 576, CET-6: 528, TOEIC: 820.
- **Technical skills:** Wind, Bloomberg, FactSet, Microsoft Office (**Word, Excel and PowerPoint**).
- **Certification:** Accounting Qualification, Security Qualification, Fund Qualification, CFA and CPA candidate.
- **Interests:** Aerial Yoga, Hot Yoga, Diving at 13 islands of 5 countries.

张晓宇

手机：+852 54871558 +86 14714425006 邮箱：zhangxy923@126.com

教育背景

香港城市大学

香港

硕士 金融服务学

08/2016-11/2017

- 核心课程：投资学、固定收益证券、衍生品及其风险管理、公司金融、财务报告分析、信用风险管理

首都经济贸易大学

北京, 中国

学士 金融学

09/2008-06/2012

- 绩点：3.64/4.3 人民奖学金：连续7次获得（前10%）

核心课程：投资银行学、证券投资基金、金融模型设计、会计学、经济法

香港大学

香港

暑期交换生

07/2011-08/2011

- 成绩：A 核心课程：财务分析、市场管理学、英文写作

工作经历

东兴证券研究所

深圳, 中国

助理研究员（实习） 计算机组

02/2017- 至今

- 跟踪178只计算机行业个股，关注公司公告、动态和行业新闻，并持续追踪热点专题。重点覆盖消费金融、互联网+、人工智能板块，收集、分析宏观背景和公司基本数据，使用Wind、Bloomberg收集财务数据。
- 协助分析师制作周报：行业与公司数据更新、图表绘制；会议录音整理；公司财务报表分析、模型建立。
- 协助分析师撰写公司深度报告2篇（思创医惠、汇纳科技），行业深度报告2篇（RFID、消费金融）；并购业务研究若干（奥马电器、康耐特、海立美达、禾嘉股份等）。
- 陪同分析师与买方机构洽谈，参加公司调研活动。

罗兰贝格战略咨询

上海, 中国

助理分析师（实习） 金融服务部

09/2016-11/2016

- 参与山西证券整体战略规划项目：前期桌面研究了解客户和行业信息，进行商业尽职调查，协助设计部门职能优化方案，探测方案的可行性和可衡量性，撰写报告、制作PPT并向项目经理和客户汇报。
- 协助某券商设立网络金融部：通过资料研究、数据分析、拜访电话了解并分析国内领先券商互联网金融部门设置的实践，协助构建组织结构模型。

中国银行

北京, 中国

客户经理 个人金融部

09/2012-06/2016

- 研究基金、外汇和黄金行情；投资策略组成员，制定产品及营销策略；撰写投资市场分析报告。
- 快速学习新发基金及投资产品，结合市场和产品特点编制学习材料，为网点内9名业务人员设立学习小组，讲解产品、投资风险和办理流程，带动全员为客户提供产品服务。
- 为零售客户提供理财咨询；发掘并维护高净值客户，为其提供资产配置及流动性管理建议。月均销售基金300万、理财500万、保险50万元。

项目经验

雅培制药财务分析 (NYSE:ABT)

香港

队长

03/2017-04/2017

- 分析公司近3年财务数据，并进行估值分析、竞争者比较分析、行业比较分析，撰写研究报告并讲演。

任职情况

金融学院学生会

北京, 中国

副主席

09/2009-06/2010

- 策划校内首届金融职业能力大赛，邀请银行优秀员工做比赛指导，近200人参与，至今连续举办7届。
- 组织举办校内二手书交易活动，开展范围覆盖全校，转让书籍近1000本，剩余300本捐赠给希望小学。

技能&爱好

- 语言：IELTS: 6.5 CET-6: 528 CET-4: 576 TOEIC: 820
- 软件：Wind; Bloomberg; FactSet; 办公软件 (Excel, Word, PowerPoint)
- 资格证书：会计从业资格、证券从业资格、基金从业资格、CFA & CPA 考生