ZHU Jinghong (Julie)

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EDUCATIONAL BACKGROUND

09/2015-05/2016   The Hong Kong Polytechnic University   **Hong Kong**

Master of Finance (Investment Management), Graduate with Distinction, GPA:3.75/4.0

09/2011-06/2015   Nankai University   **Tianjin, China**

Bachelor of Sciences- Mathematics and Applied Mathematics, Grade: 80/100

Bachelor of Management- Human Resource Management, Grade: 86.09/100

ACADEMIC EXPERIENCE

Master of Science- Finance (Investment Management)

Quantitative Method (A+), Fixed Income Securities (A), Derivatives (A), Investments (A), Economics (A), Accounting (A)

o   Stock Valuation Report: Used financial fundamentals to conduct DCF valuation, successfully project the price trend.

o   Asset Allocation Report: Used CAPM model to derive the best allocation strategy under a certain target return; the allocation covers 6 asset classes and 3 currencies.

PROFESSIONAL ASSOCIATIONS

o   06/2017   CFA Level II, passed   o   11/2016 FRM Level I, passed

o   12/2015   CFA Level I, passed   o   2013   Computer second-level certificate in Access

WORK & INTERN EXPERIENCE

6/2016~Current   Maples Fund Services (Asia) Limited – Senior Data and Reporting Analyst   Hong Kong

o   Lead fund onboard project, closely communicate with the client and teammates to design customized reports, workflows, templates, etc. The onboarding process was smooth and now turns into regular reporting; the provided reports are tailor-made with high quality, which earn high comments from the client as well as a couple of referrals.

o   Achieve portfolio valuation and performance analysis for different funds, including Retirement Funds, Hedge funds and Family Offices; the investment scale covers various listed products, as well as private equities, total return swaps, currency forwards, etc. Produce scheduled reports includes Trail Balance, Profit and Loss, Exposure Summary, etc.; design customized reports as per clients' requests, mostly focus on risk statistics covering VAR, Concentration Limits, Jensen's Alpha, Tracking Error, etc.

o   Work independently to develop numerous Excel VBA projects to improve work quality, enhance efficiency or meet ad hoc requests. Developed projects are shared among teammates and earned good reputation.

o   Work with a global team to manage a large scale of portfolios data; perform trade capture, price validation and position reconciliation to assure data accuracy.

3/2015~6/2015   Guotai Junan Futures – Associate of Quantitative Financial Analyst   Tianjin, China

o   helped build the mathematical model of the fund-management part of the programmed transaction system

o   engaged in the field visit of a client company, helped build the hedging plan of the company

AWARDS

2014   The second prize (Honorable Mention), Mathematical Contest in Modeling

2013   The third prize scholarship of the university

SPECIAL SKILLS & INTEREST

Computing	Microsoft Office Applications – Advanced User
	Excel VBA; R language – Advanced User
	Bloomberg; Geneva – Advanced User
Language	Fluent English (written & spoken, CET-6: 611, GMAT/700)
	Native Chinese (written & spoken), Mandarin & Cantonese
Non-work	Volunteer for National University Sports Games, Tianjin, 2012
Interest	Drawing cartoons/comics; scientific fiction movies; sports