

# XU, YINGYING (JACKIE)

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## EDUCATION

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### The University of Hong Kong

Aug 2010 - Nov 2011

- Master of Finance (Streamed in Financial Engineering): Cumulative GPA 3.70.
- Recognized by the Dean's Honours List.
- Coursework - Group Projects: "Great China Rainbow Fund": Product Design and Hedging Strategy Analysis; Financial Statement Analysis: "Potential Risks with Rapid Expansion of Tsingtao".

### Shanghai Institute of Foreign Trade, Shanghai, China

Sep 2006 - Jul 2010

- Bachelor of Economics (Major in Financial Engineering): Ranked 4/56.
- Outstanding Graduate of Shanghai Institute of Foreign Trade.
- Awarded the First-class Scholarship for Excellent Students for 2 consecutive years.

## EXPERIENCE

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### JK Capital Management Ltd.

Hong Kong

*Fund management company*

#### Analyst

Jan 2015 - Present

- Assisted senior analysts to prepare research reports, company updates and financial models for HK/China consumer companies and China power companies mainly listed in Hong Kong.
- Assisted senior analysts to prepare meeting minutes/materials for particular China property developers listed in Hong Kong.
- Prepared preliminary studies on the TV broadcasting companies and the commercial/industrial property companies in the initially defined stock universe of the Shanghai-Hong Kong Stock Connect north-bound program.
- Attended company result presentations, NDRs, analyst meetings, etc.

#### Research Assistant / Operations

Jan 2012 - Dec 2014

- Performed daily reconciliation with custody reports.
- Monitored trade settlement. Performed pre-settlement matching. Liaised settlement issues with brokers and custodians.
- Produced risk and performance analytic reports with the Bloomberg functions.
- Data preparation for marketing materials and factsheets:
  - Prepared performance and macroeconomy statistics, charts, tables, security data and multiples.
  - Maintained and updated Bloomberg excel formula.
- Performed analysis on performance reporting standards.
- Ad-hoc project implementation.

### Siemens Ltd., China

Shanghai, China

*Leading global electrical and electronics company*

#### Team Assistant, Expo Program

Dec 2009 - Jun 2010

- Performed daily operative and marketing support activities.
- Prepared newsletters on the topic of energy industry, high tech and business meetings.
- Guided Siemens VIPs the tour around the WATW Pavilion in Shanghai World Expo site.

### Junior Achievement (Shanghai SIFT Team)

Shanghai, China

*Non-profit youth organization*

#### Volunteer

Mar 2007 - Jan 2008

- Coordinated the JA events for career development and invited students to participate.
- Participated in the promotion of JA programs and activities, and produced promotional materials.

## QUALIFICATIONS

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| <b>Professional</b> | Passed Level II of the CFA exam in 2016. Qualified for Hong Kong SFC Type 9 activities.   |
| <b>Languages</b>    | Native Shanghaiese and Mandarin. Fluent English. Conversational Cantonese.                |
| <b>Skills</b>       | Frequent user of Excel, Word, PPT, and Bloomberg Terminal; Experience in using Excel VBA. |