

SHIYI (Juilice) ZHOU

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EDUCATION

DePauw University, IN, U.S.A.

May 2013

- Management Fellows Program for Distinction Economics Student
- President's award for half-tuition waiver; Dean's list 2009 to graduation
- Bachelor of arts in Economics & Mathematics, Major GPA 3.8

FINANCIAL EXPERIENCE

GF Securities (HK) Brokerage Limited

Dec 2016 - Present

Equity Research, Lead Analyst of Utilities & Renewable Energy

- Provide comprehensive coverage of China Utility & Renewable Energy (22 stocks under primary coverage) through the analysis of industry macro trends and company financials
- Write in-depth, timely and critical research reports on stocks, industry and creative themes
- Actively carry out marketing role and pitch clients with investment ideas and recommendations
- Develop strong relationship with senior management of coverage companies to obtain non-deal roadshows
- Maintain good communications across Equity Sales, ECM and IBD

China International Capital Corporation

July 2013-Sep 2016

Equity Research Analyst, TMT & Public Utilities

- Take on independent coverage of IPPs and environmental service companies (15 stocks under primary coverage)
- Produce high-quality research reports, including daily market commentaries, sector reports and individual stock reports for the China Utility space
- Track industry news, company events and earnings to keep timely updates for the sales and institutional clients
- Build and maintain financial models and industry databases to ensure correct up-to-date information for fundamental analysis and different valuation techniques
- Assist the lead analyst to conduct roadshows, organize client events and develop relationship with listco.
- Provide all-round research support for ECM deals and IPOs

Orient Capital

January 2012-June 2013

Part-time research analyst

- Generated investment ideas, mostly China Concepts Stocks for US and European hedge funds and executed research initiatives.
- Wrote monthly track reports on companies and sub-sectors in China's consumer industry by analyzing the on-the-ground survey data.
- Independently wrote "Internet Financing Series Report" & "Failed Land Sales in China" & "Insurance Investment in China" & "Capital Flight" and successfully pitched to 4 clients.
- Supported senior analysts to perform macro research on China's shadow banking, trust and property market by building and maintaining databases of trust products and wealth management products issued after 2010 as well as conducting interviews with professionals and experts in the industry.

Industrial Securities

May 2012-August 2012

Intern, Investment Management Department

- Updated the investment database by revaluating 100 most traded stocks and added 5 new companies to the current investment portfolio by researching and analyzing more than 50 industries.
- Drafted the weekly investment reports for VIP clients, assisted investment managers with the presentations on investment strategies given to the institutional investors.
- Persuaded 50 new investors to open the trading accounts and attracted 200 potential clients to participate the monthly investors' salon by developing the "Lunchtime Promoting Mechanism".

COMPUTER & SKILL

Computer: Excel, PowerPoint, VBA, Eview, FactSet, Bloomberg, CEIC

Language: English, Mandarin, Cantonese