

XINYUE ZHANG (CATHERINE)

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EDUCATION

LONDON BUSINESS SCHOOL

LONDON, U.K.

Reading for Master in Financial Analysis degree

08/2021-09/2022

- **Coursework:** Securities Valuation & Financial Modelling, Financial Statements Analysis, M&A, Asset Management, Data Analysis

UNIVERSITY OF SYDNEY, BUSINESS SCHOOL

SYDNEY, AUSTRALIA

Bachelor of Commerce in Finance, and Business Analytics (GPA: 3.9/4.0, Major GPA: 4.0/4.0, Top 3%)

07/2017-02/2021

- **Honors:** Dean's Honor List | Beta Gamma Sigma International Academic Honors Society lifetime member | Academic Merit Prize \$1000 | CFA level II candidate | Ranked 2 /744 and received Congratulation Letter from Business School Dean
- **Coursework:** Corporate Finance, Portfolio Management, Accounting, Statistical Modelling, Machine Learning, Economics

WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA (SEMESTER EXCHANGE)

PHILADELPHIA, U.S.

Finance, Statistics, and Operation Management (GPA: 3.8/4.0)

01/2020-07/2020

- **Awards:** Vice Chancellor's Global Mobility Scholarship \$3000; Business School Exchange Scholarships \$2000
- **Coursework:** Fixed Income Securities, Time Series, Capital Market, Operations Management, Microeconomics

INTERNSHIP EXPERIENCE

CHINA INTERNATIONAL CAPITAL CORPORATION LIMITED (CICC)

BEIJING, CHINA

Analyst Intern, Investment Banking

06/2021 - 09/2021

- Prepared pitchbooks and roadshows for Hong Kong & A-share IPOs (\$5bn) and refinancing (\$1.4bn) of big data and biomedical firms
- Summarized valuation methods for biomedical companies (r-NPV, Options, DCF & Multiple) and updated valuation data of 20 comps
- Evaluated a \$97bn market cap U.S. top SaaS company (Snowflake) regarding business highlights, financial performance, industry competition and prospects; Delivered 12-page report and a 15-minute presentation to the management team
- Organized refinancing data of 134 Hong Kong stocks in recent 3 years and drafted refinancing time schedule for client

HUATAI SECURITIES (HONG KONG)

BEIJING, CHINA

Analyst Intern, International Investment Banking Dept.

04/2021 - 06/2021

- Worked in the Hong Kong team of 6 to compile prospectus and teasers for Hong Kong IPOs of real estate and TMT companies
- Compared pros and cons of A-share and H-share listing path; Analyzed market quotation and H-share full circulation
- Evaluated spin-off listing of A+H share IPOs with 3 colleagues; Conducted spin-off necessity analysis for a client company
- Managed walkthrough test control table of 53 clients; Extracted IPO data (P/E, filing to listing timeline etc.) of 34 comps by Wind

ACCENTURE

BEIJING, CHINA

Business Analyst Intern, Strategy & Management & IT Dept.

07/2020 - 04/2021

- Restructured financial accounting data platform and performed system management for a top insurance company (\$100bn market cap)
- Delivered strategic IPD solution of mass production system optimization for an intelligent wearable manufacture firm (\$5.4bn market cap)
- Identified pain points within client's product line, personnel function and cross-department end-to-end mechanism

CHINA SECURITIES CO., LTD.

BEIJING, CHINA

Capital Investment Analyst Intern, Private Equity Dept.

12/2018 - 02/2019

- Conducted due diligence, field investigation and industrial analysis of 4 target companies within TMT industry
- Assessed clients' investment highlights and risks by examining their business, prospects and industrial competition in big data industry
- Performed financial modeling, profit forecast, investment return sensitivity analysis (IRR, MOC), and PE, PB valuation
- Delivered 20-page project analysis report for a big data company and successfully finalized the \$30mm investment process

PROJECTS & LEADERSHIP EXPERIENCE

ACCENTURE CROSS-DISCIPLINARY CONSULTING PROJECT, AUSTRALIA

08/2020 - 12/2020

- Led a cross-disciplinary team of 5 to develop micro-credentials strategy for higher education sector to mitigate the impact of Covid-19
- Conducted design thinking, trend research, survey & stakeholder analysis; Team ranked the 1st and present to NSW Education Department

FIXED INCOME ASSET EVALUATION, WHARTON FINANCE, UPENN, U.S.

02/2020 - 06/2020

- Evaluated the price of a 30-year Freddie Mac MBS using Black-Scholes and Ho-Lee model with Monte Carlo Simulation
- Built zero cost portfolio hedging strategies to perform interest risk management and reduce interest risk on price by 64%

ASSET MANAGEMENT AND ALLOCATION, AUSTRALIA

08/2019 - 01/2020

- Established 5-factor regression model and calculated ratios to analyze 9 U.S. fund's performance; Run hypothesis tests and p-value diagnosis
- Built the optimal portfolio with 23% return against investor's utility and risk tolerance using asset allocation strategies in Solver

COUNCILOR OF OFFICIAL STUDENT REPRESENTATIVE COUNCIL, UNIVERSITY OF SYDNEY

07/2018 - 06/2019

- Worked with student council team to promote multi-cultural campus activities, and workshops to improve student community engagement

SPECIAL SKILLS

- **Technical:** Microsoft Office, Wind, Capital IQ, Thomson One, Python, R; Monte Carlo Simulation, Decision Tree, Sensitivity Analysis
- **Languages:** Mandarin (Native), English (Fluent), GRE 330, IELTS Speaking Test 7.5
- **Activities:** Australia IM/Pact National Investment Management Competition Finalist; USYD Sponsorship Dept. Coordinator
- **Volunteer:** International English Teaching Program | Sydney Koala Rescue Program | Sydney Festivals and Color Run
- **Interests:** Dance (Hip-Hop & Jazz), singing (high school chorus member and performed in the China National Theater), photographing