

Dan Zuo

Sex: Female

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EDUCATION

City University of Hong Kong	09/2020-02/2022
-- Major: Master of Science in Financial Engineering	
-- Elective courses: Corporate Finance, Financial Statement Analysis in Global Context, investment, etc.	
South China Normal University	09/2015-07/2019
-- Major: Bachelor of Economics in Finance	
-- Elective courses: Fixed Income, Investment Banking, Macro&Microeconomics, Securities Investment Analysis, etc.	
South China Normal University	09/2015-07/2019
-- Major: Bachelor of Arts in English	
-- Elective courses: Advanced English, English Translation Theory and Practice, English Writing, Extensive Reading, etc.	

PROJECT EXPERIENCES

Valuation Projects

- Valuation of the Company: Use DCF and relative valuation method to value companies' shares and report.
- Valuation of Convertible Bonds: Valuate convertible bonds by using B-S model and binary tree.
- Valuation of Portfolio: Valuate portfolios by using CAPM.

Research on Financial Statements and Corporate Capital Structure

- Analyse the statements of Guizhou Maotai Liquor Co., Ltd. by using the horizontal and vertical analysis methods, etc.
- Research the capital structure by using MM theory, trade-off theory and priority financing theory.

Asset Management and Fund Allocation

- Use descriptive statistics, Markowitz portfolio theory and utility function to complete an optimization case analysis, obtain the optimal asset allocation under a certain return requirement.
- Use Excel function and VBA function respectively to find the optimal portfolio. Generate efficient frontier and draw capital market lines. Use Excel Solver to identify global minimum variance portfolios and tangent portfolios, maximizing the Sharpe ratio as a constraint.

Research on venture capital and venture financing

Explored the reasons why investors supply cash for high-risk firms, how to mitigate investment risks, how to evaluate and analyze start-ups, and how to attract capital under the guidance of Shai Benjamin Bernstein, a tenured professor of Harvard University.

- The purpose and motivation behind venture capital and financing.
- From the standpoint of venture capital: venture capital appraisal, investment strategy, angel investment.
- From the standpoint of startups: capital requirement, financing plan, equity dilution, important contract terms, IPO.
- POCD Framework, The VC Valuation Method, VC Fund Structure, VC Deal & Decision Pipeline, Capitalization Tables.

Research on the theory and practice of behavioral finance

- Use the prospect theory to analyse individual's choices and irrational behavior in the stock market.

INTERSHIP EXPERICES

Guangzhou Huashang Vocational College – Lecturer	09/2021-Now
-- Responsible for the teaching of financial statement analysis, big data, fund investment, financial laws and other courses.	
-- Preside over scientific research of the faculty team, and engage in other research projects as a core member.	
-- Join the textbook compilation group and participate in various ability competitions and professional skill trainings.	
GF Securities Guangzhou Zengcheng business department – Management Trainee	05/2020-06/2020
-- Participate in the company's morning meeting, master and track the daily dynamics of the capital market.	
-- Read and excavate the financial reports of listed companies, and write research reports.	
South China Normal University Management Office– Management Trainee	06/2019-08/2019
-- Responsible for a series of copywriting and report production, put forward analysis reports.	

-- Responsible for personnel management, personnel training and public relations events. Regularly conduct compliance checks on employees' attendance and work.

ICBC - Personal Loan Department and Sales Department Manager

07/2017-09/2017

- Review, scanning, entry and filing of personal loan customer data, and improve the bank loan database.
- Familiar with banking business, guide and handle business according to customer needs.
- Assist the manager to carry out credit investigation and audit, sort out credit files and make data forms.

HONORS & CERTIFICATE

- Securities Practice Qualification Certificate
- "Comprehensive First Prize" scholarship for outstanding students
- Special scholarship for "professional skills and Innovation Award"
- Third prize of "American College Students Mathematical Modeling Competition"
- National innovative experimental project (College Students' innovation and entrepreneurship training program)
- Winning prize of teachers' teaching ability competition
- Training certificate of big data and accounting series and professional construction teaching and research seminar
- Financial Intelligent Investment Advisor Skills Intermediate Certification Teacher Certificate
- Excellent Instructor - Second Prize of the 12th Mathor Cup College Mathematical Modeling Challenge in 2022
- Certificate of Psychological Counselor, Institute of Psychology, CAS

Academic Research

- As the first author, successfully accepted by the international conference CONF-SPML2023 and published papers :
Research on Using AdaBoost with K-means and SMOTE to Predict the Incidence of Diabetes
- As the first author, successfully accepted by the international conference CONF-BPS2023 and published papers :
Secondary Private Equity Funds in China

ADDITIONAL INFORMATION

Office, SPSS, Python, Finance, Psychology, etc.