

EDUCATION

North Carolina State University, Raleigh, NC	
Master of Financial Mathematics	December 2026
Wake Forest University, Winston Salem, NC	
Master of Science in Business Analytics	May 2025
GPA: 3.91/4.0	
Bachelor of Science in Mathematical Economics (Minor: Psychology)	May 2024
GPA: 3.61	
Relevant Coursework: Applications of Machine Learning, Data Management for Business Analytics, Supply Chain Analytics, Dynamic Programming, Probability Theory, Ordinary Differential Equations, International Finance, Financial and Risk Analysis	

CERTIFICATIONS

Corporate Finance Institute   FMVA, FPWMP Certified Designation	October 2024
Google Analytics Certification   Certified on Mar. 4th, 2025	
Quant Finance Institute   Quant Finance Bootcamp, in-progress	
QuantNet   C++ Programming for Financial Engineering, in progress	

TECHNICAL SKILLS

Programming: Python, SQL, Java, C++, Linux
Technologies: Microsoft Office Suite: Excel, Word, PowerPoint, Outlook, Tableau, PowerBI, CRSP, Wharton Research Data Service (WRSD), Refinitiv, Wind (China)
Packages: yfinance, Pandas, scipy, sklearn.model, sklearn.ensemble, sklearn.metrics, imblearn, sklearn.decomposition, xgboost, plotly, matplotlib, seaborn, statsmodels

PROFESSIONAL EXPERIENCE

Incoming Quantitative Analytics Intern, SDIC Securities Co., Shenzhen, China	May 2025 – August 2025
Graduate Research Assistant, Wake Forest University School of Business, Winston-Salem, NC	August 2024 – Present
<ul style="list-style-type: none"><li>Developed a Python-based simulation framework to model a tax-efficient ETF portfolio replicating a market benchmark over a 16-year horizon</li><li>Engineered annual portfolio rebalancing logic and return tracking using historical data from 2007–2023, yielding an annualized tracking error of 0.01% and a simulated annual return of 11%</li><li>Automated data ingestion from Excel and constructed backtesting loops to simulate investment performance year-over-year, adjusting for IRS wash sale rule compliance in rebalancing decisions</li><li>Implemented optimization routines using scipy.optimize to allocate weights across large-, mid-, and small-cap ETFs for tax loss harvesting purposes</li></ul>	
Business Development Intern, Desheng Property Management, Shenzhen, China	June 2023 – August 2023
<ul style="list-style-type: none"><li>Enhanced managerial accounting reports for stakeholders through the integration of sensitivity analysis and benchmark comparisons, improving financial transparency and decision-making processes</li><li>Redefined the company's unique selling proposition (USP) and crafted compelling integrated marketing pitches and slide presentations, contributing to enhanced brand visibility and market positioning</li><li>Secured a project generating \$100,000 in annual revenue, demonstrating strategic insight and persuasive communication skills</li></ul>	
Consulting Intern, McKinsey & Co., Shanghai, China	December 2022 – January 2023
<ul style="list-style-type: none"><li>Conducted in-depth research on the business opportunities within the metaverse, focusing on retail, fashion, and luxury industries</li><li>Applied web3.0 technologies to overhaul manufacturing clients’ business models, resulting in strategic transformations and enhanced competitiveness</li><li>Diversified revenue streams for client companies and modernized customer payment frameworks, optimizing financial operations</li></ul>	

COMPETITION & PROJECT EXPERIENCE

1 <sup>st</sup> Place, KPMG Financial Services, Case Competition	March 2024
<ul style="list-style-type: none"><li>Presented a strategic solution for a mid-sized bank focusing on customer retention and tech-driven growth</li><li>Conducted comprehensive market analysis using Porter’s Five and PESTLE to pinpoint immediate and long-term commercial banking challenges</li><li>Delivered two 20-minute pitches showcasing detailed financial projections to senior analysts, including a 233% benchmark IRR, supported by monthly cash flow analysis to demonstrate project feasibility and profitability</li></ul>	
3rd Place, Arch Mortgage Insurance, Data Dive Competition	October 2024
<ul style="list-style-type: none"><li>Developed strategic recommendations for a regional nonprofit addressing funding and volunteer shortages under time pressure</li><li>Conducted thorough data cleaning, diagnosis, and visualization of donation and service delivery records using pandas and scikit-learn</li><li>Applied time-series analysis and ARIMA modeling to isolate trends in donation patterns and used <b>k-means clustering</b> to segment donors, enabling data-driven, targeted marketing initiatives</li></ul>	
Graduate Consultant, Mastercard	October 2024 – May 2025
<ul style="list-style-type: none"><li>Developed insights into risk measurement frameworks for Generative AI products, supplementing existing measures with quantitative metrics such as Long Perplexity, Perplexity Drift, Hallucination, Brier Score, and identified use cases as well as demonstration for metrics calculation</li><li>Reviewed internal AI assessment guidelines and drafted an executive-level AI valuation proposal incorporating historical price trends, government reports, return on investment analysis, and industry benchmarks to evaluate the competitive landscape of generative and probabilistic models</li><li>Conducted literature reviews and foundational research to inform data-driven recommendations for navigating the evolving Generative AI market. Presented findings to the President of AI Governance, shaping strategic discussions on AI oversight</li></ul>	
Banking Simulation, JP Morgan Investment	August 2024
<ul style="list-style-type: none"><li>Constructed a DCF model to calculate the valuation of an M&amp;A target and adjusted the model to account for a competitor bid and supply chain interruption</li><li>Created a 2-pager company profile and summary</li></ul>	

LEADERSHIP AND COMMUNITY INVOLVEMENT

Wake Forest University Old Gold and Black Student Press, News, Environment Reporter (2023 - 2024), Best of SNO award (2023)	October 2023
Wake Forest University School of Business, Student Engagement Committee (2024)	
Wake Forest University Badminton Club, Member (2022 – 2024)	