

## EDUCATION

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### MIT SLOAN SCHOOL OF MANAGEMENT

*Master of Finance on Capital Markets Concentration, February 2024; GRE:331/340*

Cambridge, MA

2022 - Present

- Anticipated Coursework: Analytics of Finance; Financial Engineering; Mergers, Acquisitions & PE; Asset Management; Business Analysis; Fixed Income Securities; Financial Markets & Human Behavior; Options & Futures; Corporate Finance; Data Analytics
- Clubs: Investment Banking Club; Data Analytics Club; Sloan Women in Management

### UNIVERSITY OF CALIFORNIA, LOS ANGELES

*B.S. in Mathematics/Economics, Dean's Honors List*

Los Angeles, CA

2018 - 2021

- Research: Identified the optimal stock portfolio using data analysis and mathematical modeling in Modern Portfolio Theory; published the report of "The Use of Sharpe Ratio in Portfolio Optimization" on CPCI
- Main Coursework: Financial Mathematics, Macroeconomics, Microeconomics, Stochastic Processes, Machine Learning, Algorithms, Optimization, Linear Algebra, Probability Theory, Differential Equations, Multivariable Calculus, Econometrics

## EXPERIENCE

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### GF SECURITIES CO., LTD. (HEAD OFFICE)

*Analyst, Equity & Derivatives Investment Department*

Guangzhou, Guangdong

Fall 2021

- Conducted quantitative research on over 6,000 funds' holdings information to evaluate fund managers' skills using exploratory data analysis; categorized stocks in holdings into 4 sub-portfolios to implement portfolio simulation and factor IC analysis.
- Presented findings to clients proposing that new stocks factor had great predictive effect with highest 4% IC score and reflected managers' strong stocks' selectivity; gave helpful advice on building investment portfolios to increase return by 25%.

### *Summer Intern, Debt Underwriting Department*

Summer 2021

- Constructed customized bond financing proposals for clients deploying credit analysis in business risks, financial risks, and market valuation to satisfy clients' needs and improve return by over 20%.
- Visited over 200 clients to help with their requests and conducted due diligence reports analyzing business developments and capital structure; deployed python to analyze credit data to improve teamwork efficiency by 40%; awarded "best performance intern".

### E FUND MANAGEMENT CO., LTD

*Analyst, Fixed Income and Real Estate Investment Department*

Guangzhou, Guangdong

Spring 2021

- Applied investment estimation modeling in Excel and analyzed relevant data for distribution centers development project; optimized clients' return with 18% ROE and 10% NOI cap rate.
- Presented final reports including background analysis and investing recommendations to clients; researched on macro market trends to explore new investing asset classes such as CMBS and REITs to help with clients' different requests.

### CHINA GUANGFA BANK CO., LTD

*Analyst, Retail Credit Department, Head Office*

Guangzhou, Guangdong

Fall 2020

- Performed consumer credit risk analysis analyzing loans data in python; developing credit scoring model with stepwise discriminant analysis method in logistic regression to measure risk levels.
- Tested model's performance with K-S over 0.4 and PSI less than 0.1 indicating its good forecasting ability; proposed model to director and adjusted scoring standards based on different credit products.

## RESEARCH EXPERIENCE

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### FIDELITY INVESTMENTS

*"Personal Inflation" and Its Investment Impact*

Cambridge, MA

2023 - Present

- Examined the fundamental thought leadership on the role of inflation in asset allocation framework by choosing different representative asset classes such as S&P 500, MSCI EAFE, bonds, and cash data starting from 1970s to evaluate their hedging abilities using regressions when inflation is considered high above 4%.
- Created asset allocation model that adjusted based on clients' personal inflation including identifying the best asset class and determining the ideal combination of the sub asset classes and alternative based on clients' profiles and risk exposure.

## ADDITIONAL INFORMATION

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- Computer Skills: Python, R, SQL, Excel, PowerPoint, Word
- Interests: Public Speaking, Acting, Piano(Tenth Level), Bawu(Tenth Level), Bassoon
- Languages: English(fluent), Chinese(native)