

Zhuoxin Li

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EDUCATIONAL BACKGROUND

Columbia University, New York, US

09/2020-12/2021

Major: Actuarial Science

Master of Science

- **GPA: 3.69**
- **Courses:** Actuarial Methods II, Predict modeling in Finance, Financial Accounting, Actuarial Models, Data Science in Finance analysis, Statistical Inference, Actuarial Methods I, Models for Finance&Economics, Probability Theory

Dongbei University of Finance and Economics, Dalian, China

09/2016-07/2020

Major: Finance(Actuarial Science track)

Master of Economics

- **GPA: 3.69**
- **Courses:** Computer Application foundation, Data Processing and Programming, Advanced Mathematics A1/A2, Linear Algebra, SPSS software and Data Analysis, Mathematical Statistic, Econometrics, Quantitative Investment and R language, Risk management, Fixed Income Securities, etc.
- **Research:** Dalian Basic Medicine pension program

RESEARCH EXPERIENCE

Making transaction strategy via various user time and download on apps

Research Assistant, Columbia University, New York, US

07/2021-Present

- Collected various monthly apps data, such as download, penetration and user time to decide the long and short portfolios.
- Engineered Python and R to calculate the alpha in Fama French three factor equation using the total portfolio return.
- Tested alpha using ANOVA and tested the heteroskedasticity and serial correlation of residual via bp test and dw test.

Research on the financial market and investment portfolio

07/2021-Present

Research Assistant, Columbia University, New York, US

- Collected 10 stocks price and calculate each weight of them to draw the Index and Markovitz Efficient Frontier via Solver.
- Applied Solver table to simulate the portfolio return of various weight of stocks.
- Created a 67-page slides and won the first one among all the research teams.

Ministry of Finance Project(2009T026): Dalian Basic Medicine pension program

5/2019-11/2019

Research Assistant, Dongbei University of Finance and Economics, Dalian, China

- Engineered R code to predict 3 logistic model parameters(Peak, Initial, Growth rate) describing the future 30 years trend of pension income.
- Compared the pension income trend of Dalian, China and United State to stable the algorithm.
- Applied ks test to check the result, whose error is less than 5% of that of Ministry of Finance(95% confidence interval).

DID analysis of Bank reformation in Xinjiang area

11/2019-11/2019

Research Assistant, Dongbei University of Finance and Economics, Dalian, China

- Engineered R code to estimate the DID factor describing the change of the portion of personal debt and corporation debt.
- Tested the DID estimators via ks test and analyzed the reformation of bank trough safety, liquidity and profitability.
- Summarized the analysis as 6 pages essay.

Goldman Sachs Risk Management/Quant analysis Workshop

02/2019-03/2019

Research member, Columbia University, Online

- Engineered Python code to forecast the trend of Tencent(00700) stock value and EBIT, ROE and ROA.
- Applied departure method and visualized MACD to find the bid and ask of Tencent.
- Summarized research(30 pages PPT), successfully predicting Tencent will be rebounded at HK\$355 in one month.

PRACTICAL EXPERIENCE

Ping An Property Insurance Co. Ltd, Shenzhen, China

02/2021- 05/2021

Actuarial Intern

- Assisted product manager to analyze the growth rate of auto insurance market by Excel and make the attribution of rate growth, so as to coordinate the business relationship between underwriting and claim settlement.
- Assist HR Department in employee compensation report automation project, report visualization and compensation change tracking through Python.
- The automation project won the first place in the group competition (6 groups with more than 20 participants).

Dacheng Fund Management Co. Ltd, Shenzhen, China

07/2020-09/2020

Analysis Intern

- Assisted comparing yield, sharpe ratio, etc of 27 different funds and wrote the recommendation report to Ant Finance.
- Analyzed high - frequency words in forum and wrote live content, which gained 128,700 views and 20,000 thumbs up.
- Researched user portraits and wrote the marketing plan, which increased the sales volume of \$200 million funds.

CITIC Securities, Shenzhen, China

02/2019-03/2019

Marketing Assistant

- Assisted client manager to go out to expand clients, analyzed client assets, and provided clients with advice on products including but not limited to private equity, public equity funds, insurance, etc.
- Participated in some financial audits, sorted out business contracts and personal data of past customers, and participated in the preparation of documents for anti-money laundering and compliance.

Entrepreneurial Experience

Huiyinfeng (Shenzhen) Education Service Inc, Dalian, China

05/2017-08/2018

Chief Executive Officer&Founder

- Registered the company in Bureau of Industry and Commerce, China, register No. **91440300MA5EQ64G3A**;
- Organized more than 6 off-campus seminars to recruit students to participate CCBC(China Cyber Business competition)
- Coordinated with JD.com to increase 100 registration of JD credit card in exchange for funding and free headquarter visit
- Budgeted the Guest invitation fee, hotel fee, material production fee, etc

Ivy League Summit, Shanghai, China

10/2018-11/2020

Chief Executive Officer&Founder

- Scheduled the whole process of the Summit, including the topic of the summit, inviting the guests from relative filed
- Coordinated with Prof. Qian, Xuening, Academic Secretary of the Chief Economist Forum of China, to prepare the content of summit
- About 300 people participated the summit and the guests invited including, Mi, Qun, Li, Feng, Cheng, Yan, CEOs and COOs from different big companies

Honours and Membership

- **Honours:** University - level comprehensive first-class scholarship(Spring 2019 - Fall 2019); University - level comprehensive second-class scholarship(Fall 2018 - Spring 2019); University - level comprehensive third-class scholarship(Spring 2017 - Fall 2017);
- **Certificate:** FRM Holder, CFA Level I, P and FM exams of SOA, China securities certificate, fund certificate and future certificate