

# Yuan Wang

Date of Birth: June 10, 2002

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## EDUCATION BACKGROUND

**Lehigh University, Bethlehem, PA**

08/2021 – 06/2024

BSc in Finance | Overall GPA: 3.49/ 4.00

Dean's list for Spring 2023

**Beijing International Studies University, Beijing, China**

09/2020 – 06/2021

Major: Hotel Management

## WORK EXPERIENCES

**TF Securities Co., Ltd.**

**Shanghai, P.R.China (Online)**

06/2023 – 09/2023

- Position: Research Assistant
- Daily work: updated official account maps every day; Collected and organized data; Organized meetings; Produced slides of industry and company roadshow
- Data maintenance: updated individual stock databases, sorted report data by quarter, and further analyzed industry data trends
- Reported in-depth analysis of individual stocks, analyzed industry trends, competitive landscape, domestic policy changes, and business growth points with strong certainty for the company

**Caida Securities Co., Ltd.**

**Beijing, P.R.China (Online)**

12/2022 – 01/2023

- Position: Research Assistant
- Participated in and assisted project managers in writing industry research reports
- Proofread documents (public transfer prospectus, prospectus, etc.)
- Got familiar with the internal structure of securities companies

**Shenwan Hongyuan Securities Co., Ltd.**

**Shanghai, P.R.China (Online)**

06/2022 – 08/2022

- Position: Investment Banking Intern
- Studied the disclosed information of listed companies by utilizing professional software
- Practiced the methods of due diligence and assisted supervisors in conducting investigations of relevant companies
- Assisted in completing daily research, tracking, and research, organized industry research reports and drafted investment value analysis reports for listed companies

## ACADEMIC PROJECTS

**The Hersheys Group Case Study in Course Corporate Financial Policy**

01/2023 – 05/2023

- Position: Main Member
- Used tools sec.gov and Finra to search for company data, including Beta, risk free rate, number of shares outstanding, etc
- Calculated the cost of equity using the CAPM formula
- Calculated WACC using the formula and the data obtained from the above search
- Calculated the value of stocks using WACC and cash flow data found from Yahoo finance
- Improved the understanding the meaning of financial data and the connections (i.e. formulas)

**The Catpillar Group Case Study in Course Security Analysis & Portfolio**

05/2023 – 07/2023

- Position: Group Member
- Collected stock information of the company and tabulated the spreadsheet
- Studied the time period of significant changes
- Analyzed the company's official financial statements, federal reserve (interest rate and inflation rate), press conference
- Illustrated the reasons behind different fluctuations in data, using data to illustrate, such as CPI, actual income, PPI, job vacancies, and labor mobility rates

## OTHER COMPETENCE

Soccer: Main player of the Lehigh University Soccer Team

Club Engagement: Member of Lehigh Barbell Club

Computer Skills: Proficient in R, SQL, STATA, SPSS, MATLAB, Tableau