

Andy Zhang

www.andyzhang.me

Mobile: (613)-710-6938
Email/Skype: AndyZhang@live.ca

EDUCATION

University of Waterloo

Bachelor of Computer Science, Data Science

Waterloo, ON
Sep 2016 – Sep 2021

Wilfrid Laurier University

Bachelor of Business Administration, Finance

Waterloo, ON
Sep 2016 – Sep 2021

WORK EXPERIENCE

Waratah Capital Advisors

Private Equity Analyst (Incoming)

Toronto, ON
Sep 2019 - Dec 2019

Laurier Management Consulting Practicum

Pro Bono Management Consultant

Toronto, ON
May 2019 - Aug 2019

- **Consulting:** Working with consultant mentors on a mandate for a Toronto nonprofit organization concerning autism treatment.

CI - Cambridge Global Asset Management

Research Analyst

Toronto, ON
Jan 2019 - Apr 2019

- **Investment:** Built models to forecast future performance of companies and reviewed investment theses with PMs and analysts.
- **Equity Research:** Interviewed company directors and analyzed reports to gain industry insight.
- **Portfolio Analysis:** Worked with analysts, traders and PMs to develop reports on numerous logistical benchmarks, such as market and geographic exposure of funds, using VBA, FactSet and Bloomberg.

Selected Research Projects:

- Developed a model and an investment thesis for a fast-growing European omni-channel retailer, incorporating store economics projections as well as retail consumer trends, and performed due diligence through interviewing the CFO as well as directors of comparable companies.
- Developed a model and an investment thesis for a global convenience goods company, incorporating regulatory risks, and performed due diligence through interviewing IR and the CEO, as well as operational employees; valued company with a DCF and a comparable multiple.

University of Waterloo Mathematics Society

Vice President of Finance

Waterloo, ON
May 2018 - Sep 2018

- **Finance:** Administered the Operating Fund, as well as the Capital Improvements Fund, totaling over \$300,000.
- **Fiscal Planning:** Drafted and approved budgets from various clubs and affiliated organizations.
- **Leadership:** Managed a team of 10+ Finance Directors to oversee the financial operations of the society.

Blackhawk Network

Marketing Analytics Intern

Toronto, ON
Jan 2018 - Apr 2018

- **Data Analysis:** Created and prepared reports and models, such as forecasting promotional sales, conducting post promotional analysis and optimizing planograms; prepared diagnostic reports on why sales for certain under-performing products are stagnant.

China Merchants Bank

Corporate Banking Intern

Wuxi, JS
May 2017 - Aug 2017

- **Sales:** Contacted over 1000 corporate clients ranging from startups to multi-billion-dollar corporations.
- **Customer Service:** Gave margin calls; prepared and delivered tutorials on new systems and products.
- **Pitching:** Wrote, edited, and delivered sales pitches for new financial products, both in English and Mandarin.

OTHER EXPERIENCE

JDC Central Laurier

Digital Strategy Delegate (Past: Parliamentary Debate Delegate)

Waterloo, ON
Aug 2018 - Apr 2020

- **Logical Analysis:** Compete and train in debate (BP and CP) and case analysis (focus on MIS cases).

Students Offering Support (SOS)

Economics Instructor

Waterloo, ON
Sep 2018

- **Teaching:** Prepared and delivered exam preparation sessions for the course EC 120 (Introduction to Microeconomics); over 600 students attended the sessions, raising over \$12,000 towards charity.

Quantify Risk & Insurance Case Competition

2nd Place Out of the 25 Teams Selected to Compete

Waterloo, ON
Jul 2018

- **Risk Analysis:** Constructed models on climate change risk to recommend a risk management solution.

OTHER INFORMATION

- **Relevant Courses:** Algorithms, Logic & Computation, Combinatorics & Optimization, Probability & Statistics, Financial Management, Economics, Accounting, Financial Modelling & Discounted Cash Flow (The Marquee Group), Machine Learning (Stanford)
- **Languages & Technical:** French (DELFB2 & French Immersion Certificate), Mandarin (Ontario Grade 12), C, C++, Scheme, VBA, MATLAB, R, Python, SQL, HTML/CSS, Ruby on Rails, Shell Script, Git, Bloomberg, FactSet, \LaTeX
- **Hobbies:** Data Science, Reading (investing, philosophy & Stephen King), Music (from Paganini to JAY Z), Staying Active (hockey & gym)