

Chengsi Gao, CFA

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EXPERIENCE

MORNINGSTAR

Chicago, IL

Investment Management Product Analyst, Morningstar Investment Management LLC

Nov 2016 – Dec 2018

- Provide account management, sales, segments, product development, marketing and other areas with information and analytics relevant to the management, development and distribution of our investment strategies, including due diligence questionnaires, performance and risk analytics with tools such as Tableau.
- Serve as the secretary on the Americas Investment Policy Committee – Organize the meetings, form agenda items with the CIO and Director of Products. Plan new product launch and oversee product sunsets.
- Identify industry competitors and run competitive analysis on an ongoing basis for all investment strategies, using Morningstar Direct and Tableau.

MORNINGSTAR

Chicago, IL

Data Analyst, US Open-End Fund Performance Team

Apr 2015 –

Nov 2016

- Worked with 500+ data providers to ensure Morningstar performance database's accuracy and efficiency, using SQL.
- Set up data delivery accounts for new vendors and solving technical/calculation issues with tech teams.
- Provided performance data calculation on data discrepancy internally and externally.
- Improved Month End distribution production by 33% (based on share class missing numbers) and set the earliest sign off record.
- Maintained internal Python programs for performance data production.

MORNINGSTAR QUANTITATIVE APPRENTICE PROGRAM

Chicago, IL

Apprentice, Quantitative Research Team

Apr 2015 – Oct 2015

- Utilized SQL and R to build regression models to analyze the relationship between management fees and AUM growth.

MORNINGSTAR

Chicago, IL

Product Consultant, Enterprise Support Team

Jul 2014 – Mar 2015

- Supported Morningstar Advisor Workstation institutional clients on questions related to data and software functionality.

FOREST PHARMACEUTICALS (Now Allergan)

Earth City, MO

Informatics Business Operations Intern

Jun 2013 – Aug 2013

- Analyzed and consolidated 200 applications for a Data Center Migration Project.
- Drafted more than 20 Retirement Plans for business operations applications.

EDUCATION

WASHINGTON UNIVERSITY IN ST. LOUIS

St. Louis, MO

Bachelor of Science in Systems Science & Engineering, Minors in Robotics and Electrical Engineering

Aug 2012 - May 2014

- Overall GPA: 3.7/4.0
- Cum Laude; Dean's List; Herman T. and Phenie R. Pott Scholar
- Production Director, Social Programming Board – WashU Student Union concert productions with \$0.5 mil annual budget

HENDRIX COLLEGE

Conway, AR

Physics (3+2 Dual Degree Engineering Program)

Aug 2009 - May 2012

- Overall GPA: 3.5/4.0

CERTIFICATE & SKILLS

- CFA Institute: Chartered Financial Analyst (CFA) charterholder since September 2018.
- Foreign Language: Chinese - Mandarin/English Translator for the International Conference on Ecological Agriculture
- Computer: Microsoft Office, Tableau, Java, SQL, R, Matlab, Python, Javascript, HTML and CSS.

ACTIVITIES

- Treasurer - Washington University Dual Degree Student Association and Hendrix College Habitat for Humanity
- Photography - Student Art Show 3rd Place and Odyssey Grant Recipient summer 2012 - Tibet Documentary Photography