

Chuiqi (Vincent) Gao

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EDUCATION

Texas A&M University, Mays Business School

Master of Science in Finance, MSF Scholarship & Fellowship

College Station, Texas

May 2019

Shandong University of Technology

Bachelor of Science in Mechanical Engineering & Finance

Zibo, Shandong/China

June 2017

Honors: 1st Place-MS Finance July Stock Competition, 43% total return (Texas A&M University, 2018), MSF Scholarship, STEM to Stocks Fellowship

EXPERIENCE

Harmonia Capital USA

Wealth Management Analyst

Houston, Texas

July 2019 – Present

- Pitched and generated investment products recommendations to wealth advisors and provided them with understandings of different investment vehicles
- Engaged with wealth advisors, providing them with timely capital markets investment ideas and professional analytical support based on market research
- Worked on various important projects such as business development, financial planning, and marketing presentation preparations
- Assisted with the asset management team in developing investment products and making investment valuation by using various analytical tools such as the DCF model and financial statement analysis

Texas A&M University

Graduate Teaching (Research) Assistant

College Station, Texas

September 2018 – May 2019

- Assisted Dr. Arvind Mahajan with his research in supply chain management industry by analyzing the competitors, customers and supplier's data of focal companies from the Mergent database using SAS and Excel
- Assisted Dr. Arvind Mahajan in MBA class by grading homework, exams and preparing parts of in-class PowerPoint presentation

Blue Lotus Research Institute

Research Analyst Intern

College Station, Texas

March 2018 – May 2018

- Supported the research work of some popular Chinese Internet Apps such as Toutiao, TikTok, Weibo, etc. by collecting and analyzing both user behavioral data as well as related information to write part of the research report
- Analyzed financial data for targeted companies as well as the user data in excel to support the research report

Independent and private stock investor

Invested in the A-share market

Zibo, China/College Station, Texas

September 2013 – Present

- Developed a stock picking & trading strategy based on the combination of fundamental and technical analysis, and applied that investing strategy to A-share market
- Managed 300,000 RMB market cap family stock portfolio and implemented that investing strategy to the stocks in my portfolio including OLED manufacturing, film production, oil & gas, high polymer material, generating 61.42% return over the last two years, with the highest single stock return of more than 80% over the past year

Weifang Dongmeng Co. Ltd

Commodity Trading Intern

Weifang, Shandong/China

June 2016 – August 2016

- Analyzed the oil price trend through technical analysis method with 3 team members as well as providing clients with trading suggestions, resulting in 30% return over two months
- Kept abreast of the latest industry news and provide clients with updated trading suggestions

LEADERSHIP

Oral English Club

Vice President

Zibo, Shandong/China

September 2015 – December 2016

- Led group of 5 students' management efforts to recruit critical members and restructure the organization every semester; Organized and managed welcome event for new students; Resulted in Oral English Club becoming one of the most successful clubs

SKILLS & ACTIVITIES

Technical Skills: Excel (including Pivot Tables, Lookup Functions), Financial Statements Analysis, Financial Modeling (DCF, M&A, LBO modeling), Bloomberg Terminal, SAS, Python, CRM platforms, Technical Analysis

Certifications: BMC Certificate, CFA level I Candidate

Activities: MSF Financial Service Guild, Volunteer in Houston Food Bank, Volunteer in Zibo Central Hospital