

Alex Chen

alexjchen@cmu.edu | (412) 499 6158

EDUCATION

Carnegie Mellon University, *Tepper School of Business - Business Administration*

2024 | Expected

- Minor in Computer Science, Concentration in Finance, **GPA: 4.0** (Dean's List, with High Honors)
- Relevant coursework: Accounting, Finance, Investment Analysis, Fundamentals of Computer Science, Regression Analysis, Economics

University of British Columbia via University Transition Program,

2020 – 2021

Sauder School of Business - Commerce & Accelerated Highschool Program

- Rigorous academic program based on risk taking, problem solving, and quantitative challenge for an early entrance to university

PROFESSIONAL EXPERIENCE

Tartan Student Fund, *Assistant Portfolio Manager - Consumer Discretionary Team*

Sep 2021 – Present

- Managed \$80 000 backed by Carnegie Mellon's Endowment fund by researching and recommending weekly acquisitions to the fund
- Attended investment research and portfolio management meetings to discuss trade implementation, financial media coverage, and portfolio adjustments for small and mid-cap companies (\$500m - \$20 bn) based on short- and long-term market developments
- Quantitatively valued companies by working with Bloomberg Terminal and S&P CAP IQ and developed Excel models using PE, EBIT, DCF, and Comparative/Multiple methods by extracting key components of financial statements, proxy statements, and footnotes for debt schedules
- Qualitatively conducted 10K analysis by focusing on business management segmentation, comparatives between current risks disclosure to previous Ks and top-line to bottom-line trends, market for equity research, and earnings calls to compile investment catalysts

FX168 Financial Group, *Financial Analyst*

Sep 2020 – Aug 2021

- Served 200+ million website visitors by compiling financial data and researching investment media for consumers in Shanghai, Beijing, Macao, Shenzhen, and Hongkong along with over 50+ million investors globally through FX168's North American-based platform
- Followed global macro-economic trend effects on G10 currencies, reported fundamental and technical trends under the direction of JP Morgan Chase's ex-Vice President Head of FX Sales, Michael O'Neill, and assisted in writing daily pieces on risk analysis and trade strategy
- Developed forecasting tools across 35 main global financial markets and conducted MD&A analysis to discuss revenue variance across 5 key company profiles in COVID-19 struck industries, such as Disney and AMD, across travel, entertainment, FIG, and technology sectors
- Provided detail-orientated support by assisting conference calls, overlooking slide decks, and bi-weekly meetings with supervisors

re:Bloom Digital, *Project Manager & Technical Consultant*

Sep 2021 – Present

- Weekly consultation sessions with Annette Hair Co., a minority owned local business, to increase digital footprint and user retention
- Developed intuitive website via Shopify 2.0, feedback driven with real user-testing, ADA compliance, and mobile responsiveness
- Created a sustainable training program through videos and written how-to guides to allow the client to maintain their own technology
- Designed 50+ Figma wireframes in creating a uniform model on layout, color, typography, modules, and easy-to-use environment

ORGANIZATIONS

#RisingYouth Canadian Youth Service Grant, *Project Coordinator*

Jun 2020 – Sep 2021

- Created care packages for Vancouver's at-risk youth via \$7,500 of total funding from Canadian Government grants
- Partnered with the Canadian Broadcasting Corporation for a nationally-broadcasted radio interview surrounding government infrastructure behind homeless youth; published written piece through CBC Books as a finalist of 10,000+ applicants across Canada
- Volunteered with Project Backpack, an established 15 year local organization that receives essential item donations from youth through schools and community centers, and formed sponsorship partnerships worth over \$5000 with local businesses to donate goods
- Reached over 3000 students through social media presence and directly supported 100+ at-risk youth via Directions Youth Services Canada

Code 4 Free w/ Codecademy, CodingPals, *Program Director*

Nov 2018 – Sep 2021

- Founded free after-school coding classes to 100+ students by forming network of mentors students via in-person and Zoom lessons
- Coordinated tailored classes for beginner and intermediate children on Codecademy and MIT Scratch to teach Python/JS

National Speech & Debate Society, *Local Lead*

Mar 2018 – Sep 2021

- Founded debate and MUN clubs, teaching British Parliament, CNDF, Public Forum, and World Debate format to 50 local students
- Placed top 5 at international debate competitions including Harvard, Beijing, UBC Invitationals, received top Canadian speaker awards

PUBLICATIONS

Queen's Commonwealth, Polar Expressions, Youth Writers, Bowseat Ocean Awareness

- Bronze recipient of the Queen's Commonwealth Essay Competition, where over 10,000 writers competed globally
- Published in 7 poetry competitions with topics surrounding future environmental concern, social pertinent issues

Interests: Basketball, Music, Chess, E-Sports **Skills:** Python, HTML/CSS, Java, R, Microsoft Office (Excel, Powerpoint), Valuation, Accounting