

1716 Singletree Court
San Luis Obispo, CA 93405

Daniel Shu

(626) 321-5411
Dashu@calpoly.edu

EDUCATION

California Polytechnic State University, San Luis Obispo

2013 - Present

Business Administration: Finance Concentration

Expected graduation date: June 2017

RELEVANT COURSEWORK

Security Analysis and Portfolio Management

- Prepared a portfolio consisting of five companies: used financial models to analyze its historical data over a period of five years, and compared it to the S&P 500 using regression
- Assembled ten different stocks and studied the surprise returns of each stock after an earnings announcement and made educated inferences to the outcomes

Fixed Income Securities and Markets

- Heavily used Excel in multiple projects by using information learned throughout the course
 - Constructed numerous tables, graphs and amortization schedules to show how bond prices change when circumstances fluctuate
 - Used binomial tree models to find forward rates and utilized different options to bonds
 - Studied various types of treasury, corporate and municipal bonds and assembled them into a portfolio to find their weights and contributions to portfolio duration

Advanced Corporate Finance (Currently Enrolled)

- Performing a valuation analysis of a single company, forecasting its cash flows and making investment recommendations

WORK EXPERIENCE

Milestone Learning

Summer 2015

Office Assistant

Arcadia, CA

- Worked with teachers to enhance kids' academic skills from grades 5-10
- Graded assignments and organized kids' report cards using Excel
- Communicated with parents regarding their children's performances

Yanagi Sushi

2014 – 2015

Busser/server

San Luis Obispo, CA

- Assisted in providing excellent customer service in a fast paced environment
- Regularly cleaned tables and work equipment, ensuring they were stored appropriately
- Assisted hosts/hostesses in handling trays of food and greeted customers with courtesy

Arcadia Recreational Center

2011 – 2013

Volunteer

Arcadia, CA

- Provided afterschool and summer supervision to youth ranging from ages 6-11
- Worked with others to ensure children were overseen
- Organized lunches and set up activities for the kids

EXTRACURRICULARS & MERITS

- Financial Management Association – Asset Member
- Chinese Students Association – Member
- Orfalea College of Business Dean's List – Fall Quarter 2015
- Cal Poly San Luis Obispo FMA MarketWatch Trading Game Fall Quarter 2015 – 1st Place

SKILLS & ABILITIES

- Fluent in Mandarin and English
- Experienced in using Excel
- Capable of providing customer service utilizing excellent communication skills
- Punctual and precise in turning in assignments
- Skillful in Word, Excel, PowerPoint, Access
- Positive personality, work well in a group environment

INTERESTS & HOBBIES

- Traveling, basketball, fitness, investing, reading, problem-solving, experiencing new cultures