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*

Accounting GPA: 3.42

Economics GPA: 3.63

**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*

* Performed 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 out of 20

**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