Kate Luo MSc, MA

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PROFILE SUMMARY

Kate is a **dedicated** and **result-oriented** analyst with experience in **business/financial analysis, data validation** and **reporting**. Apart from possessing exceptional **analytical** and **problem-solving** skills, she is a great **team player** with strong **communication** and **presentation** skills. Also, she has a **global perspective** gained from extensive international travel experience.

TECHNICAL SKILLS

Programming Language:	**SQL**, **Advanced Excel, VBA**
Business Intelligence:	**Power BI**, **Tableau, Stata, SAS, Eviews, Bloomberg**
Databases:	**Microsoft SQL Server, MS Access**

EXPERTISE

- ✓ Data Analysis
- ✓ Data Modeling
- ✓ Reporting
- ✓ SQL – Ad hoc Analysis

- ✓ Business & Functional Requirement
- ✓ Financial Modeling
- ✓ Data Validation and Testing
- ✓ Marketing Research

PROFESSIONAL EXPERIENCE

Client Advisor, Royal Bank of Canada   Mar 2019-present
- Solid track record in relationship management by achieving 3.5% total solutions rate and maintaining high performance in the branch
- Supported management decision through weekly client analysis and dashboard design
- Demonstrated enthusiasm in the banking sector and strong ability to learn new products efficiently

Analyst, EDPYPF Services Inc.   Feb2018-Feb2019
- Analyzed industry trends and customer data in SQL database and validated the data integrity gaps
- Prepared ad hoc and ongoing Tableau reports for clients as well as demonstrated POC with self-service BI tool
- Designed and developed monthly financial income statement report automation process
- Summarized the method to resolve duplication issue in data warehouse

Analyst (Co-op), Retail Measurement Service, The Nielsen Company   Sep 2013-Feb 2014
- Proficiently used Advanced Excel and Nielsen Answers to conduct in-depth marketing research
- Generated industry analysis and competitive analysis for clients in a team environment
- Performed data mining under tight timelines while maintaining attention to detail

Intern, Report Analyst, Corporate Finance, Agricultural Bank of China   Jul 2012-Aug 2012
- Conducted customer data quality control to fix quality issue such as name and outstanding credit
- Enhanced VBA to identify and analyze key ratios (Cash Flow, LTV ratio) for credit reports
- Liaised with clients to build loyalty through visiting companies and attending business dinners

EDUCATION

- Master of Arts in Business Economics, **Wilfrid Laurier University**, Waterloo, Canada   Sep 2015 - Oct 2017
- Master of Science in Quantitative Finance, **Tilburg University**, Tilburg, Holland   Aug 2014 - Aug 2015
- Bachelor of Economic in Finance, **Sun Yat-sen University**, Guangzhou, China   Sep 2010 - Jun 2014
- Exchange Certificate, **University of Queensland**, Brisbane, Australia   Feb 2013 - July 2013

INTERESTS

- Professional Violinist - First Class Honours with Distinction in Violin Performance