

SUMMARY

Master of Finance, extensive **Data & Business** analytical experience in **Financial Service, Retail, Banking** industries focusing on **Finance, Forecasting, Risk, CRM and Marketing**

- **Business - Financial Analysis**
Proficiently apply financial modeling on budget, forecasting, revenue & variance analysis
- **Customer Transaction Analysis**
Effectively presented reports & software instructions to teammates, project leads
- **Campaign & Marketing**
Managed to gain knowledge on SQL & VBA through online resource in less than 2 weeks.
- **Technical** – Data Related
MS Access, Advanced Excel, VBA, Python, SQL, Power BI, Tableau, Snowflake
- **Other Software**
Jira, ServiceNow, Draw.io, Visual Studio Code, Google Analytics, MS office, Marco
- **Dashboard & Reporting**
*Customer Transaction Analysis
Financial Income Statement report*

EDUCATION

- Master of Finance | McMaster University | Sep 2020 - Jun 2022
- Bachelor of Economics | Southwestern University of Finance and Economics | Sep 2016 – Jun 2020
- Certificate | Google Analytics 2022 | SQL for Data Analysis – Udacity 2022

EXPERIENCE - CONTRACT

Analyst(Contract) | EDPYPF Services Inc., Markham, ON

Jan 2022 - Present

- Collected business requirement; designed and determined scope, KPI, workflow and layout to deliver the BRD
- Analyzed industry trends and customer data in SQL database and validated the data integrity gaps.
- Goal oriented Sales forecasting and planning; fund based Budget for next year and adjusted forecasts at each end of the quarters to measure where we are quarterly with actual figures.
- Designed CRM dashboard using Power BI to support management decision making & ensure effective action taking based on simplified interface whereas rich meaning of business metric design
- Analyzed a retail bank's sales, customer data to identify strategic insights for success using Power BI & Python
- Enterprise-level reporting automation using Access & Excel for Monthly income statement report

Tools Used: Excel, VBA, Power BI, SQL Server, Snowflake, SQL, Google Analytics, jira, ServiceNow, draw.io

EXPERIENCE - INTERN

Industry Research Intern | East Asia Qian Hai Securities Co., Ltd

Sep 2021 – Oct 2021

- Proven knowledge of financial market and business acumen while closely monitoring financial markets, collecting daily updates on new emerging industries; conducted detailed analysis & in-depth report to stakeholders

Analyst Intern | BIKUO Information Consulting Co., Ltd

Aug 2021 - Sep 2021

- Participated research projects with analysts on auto parts production industry, analyzed data to identify industry trends, strategic opportunities, and competitor market share.

Marketing Analyst Intern | China Life Insurance Company

Jul 2020 - Sep 2019

- Conducted data analysis to categorize targeted customers and increasing on-target rate for marketing campaign

Financial Analyst Intern | CITIC Bank

Jan 2020 - Mar 2020

- Collated and analysed the data of insurance, funds and closed-end wealth management products, producing 66 daily sales reports and 12 weekly reports of wealth management products by using Excel

EXPERIENCE – ACADEMIC PROJECT

- Case Analysis of Credit Risk Evaluation of a Bridge Loan
Apr 2022
- Case Study of Broadway's acquisition of Landmark
Mar 2022
- Risk Profile Analysis of Bank Of Montreal
Jan 2022
- Stock Portfolio Construction and Analysis
Nov 2022
- Financial Analysis Ability Training Camp
Jun 2021 – Jul 2021