

Ivan Kwong

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EDUCATION

Cornell University | Charles H. Dyson School of Applied Economics and Management

Ithaca, NY

Candidate for B.S. in Applied Economics and Management

August 2021 – May 2025

- Concentrating in Finance and Accounting; Dean's List Recipient

GPA: 4.028

PROFESSIONAL EXPERIENCE

Black Creek Investment Management

Toronto, ON

Investment Research Analyst

May 2023 – August 2023

- Developed proprietary data-driven ESG Bloomberg Terminal and MSCI ESG worksheets for flagship fund to identify potential equity investments using EU SFDR regulations, determine portfolio laggards for targeted proxy voting against ESG risks, and ensure compliance with UN PRI filings and EU SFDR regulations in effect in 2023
- Formulated fundamental analysis thesis sheets on renewable energy and infrastructure equities with particular focus on battery, solar, and renewable components, using macroeconomics, marketing, strategic, and managerial analyses; pitched theses to Managing Directors at investment meetings to recommend equities for flagship global portfolio

Cornell Financial Analysts

Ithaca, NY

Recruitment Data Analyst

February 2022 – Present

- Codified and scripted scoring spreadsheets using custom functions and historical DEI data to accurately and fairly score 300+ resumes and 150+ recruitment interviews during semesterly recruitment rounds as part of DEI initiative

Student Analyst

September 2021 – Present

- Reviewed fundamental finance, investment banking, and accounting knowledge on financial statements, valuation methods, merger model analysis through weekly group assignments and instruction from previous student interns
- Fostered research and valuation theses on energy and renewables sector equities as part of the New Member Educational Series, and explored alternative investing strategies and career pathways in Investor Series program

Rotman School of Management, University of Toronto

Toronto, ON

Student Researcher

August 2018 – August 2020

- Curated and presented the “Existing Problems of Transit Signal Priority on Streetcar Routes” (1st author) research paper on streetcar transit-signal priority, published under the Transportation Research Board journal in August 2020
- Assisted Operations Research Professor Mehdi Nourinejad on an Autonomous Vehicle (AV) disengagements research paper investigating which companies are currently leading in AV development (Apple, Phantom AI, Tesla)

LEADERSHIP AND EXTRACURRICULAR EXPERIENCE

Cornell University | AEM 2225 – Financial Accounting

Ithaca, NY

Undergraduate Course Assistant

August 2023 – Present

- Instructed weekly office hour review sessions to 20+ students on topics involving financial statement analysis, bond valuation, and inventory cost flow, providing intuitive explanations using previous real-world financial experience
- Hosted review sessions prior to exams to ensure students were proficient in various accounting topics; developed procedures to score homeworks and exams efficiently and accurately according to professor and team specifications

WVBR 93.5 FM

Ithaca, NY

Training and Recruitment Director

March 2022 – Present

- Shadowed and trained 5 DJs/semester on in-house radio console to develop radio speaking propensity and to meet FCC broadcasting regulations, as part of station goal to increase frequency and variety of weekday radio segments
- Devised weekly schedule for news/weather reports and Alternative genre tracks; broadcasted radio spots to 3k+ Tompkins County listeners requiring adherence to WVBR rules and creativity with song transitions and choices

LANGUAGES, TECHNICAL SKILLS, & INTERESTS

Languages: Cantonese (some conversational), French (some conversational)

Technical Skills: Spreadsheet Modeling, Financial Accounting, Bloomberg Terminal, MSCI, MATLAB, Python

Interests: Rock music (Velvet Underground, Pink Floyd), record collecting, hiking, dispatching simulations, ice cream