Jiachen Zhang

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Summary of Qualifications

- Driven and dependable young professional with a solid understanding of financial products and services, equity sales, and trading; detailed knowledge of economic market trends and analysis .
- Strong analytical and quantitative skills with ability to analyze and interpret market research and financial data; experience in preparing financial and valuations models in Excel.
- Dedicated to collaborating with colleagues and working independently to drive efficiency and productivity; strong interpersonal and communication skills gained from sponsorship coordinator experience.
- Technical expertise in MS Office/365, R and Python; able to master new business applications or software quickly.

Educational Background

Bachelor of Commerce, Specialist in Finance and Economics
University of Toronto, Toronto, ON   Sep. 2017 - Present
- Major in Economics and Minor in Statistics with cGPA 3.92/4.00
- Honors: current Dean's List Scholar, 2017-2020
- Awards: received New College Academic Award, 2017-2020

CFA Level I Candidate   Expected 2021

Relevant Projects

Price Discovery Algorithm Trading Project (Outperforming Award)
University of Toronto, Toronto, ON   Dec. 2019
- Developed an algorithmic trading model with Python and analyzed the random insider pricing information of the ETFs and their underlying securities to recommend the securities valuation and identify competitive mispricing opportunities.

Risk Lab Equity and Risk Management Case Competition (Second Place)
University of Toronto Risk Lab, Toronto, ON   Apr. 2019
- Processed large datasets in Excel and R to build regression models and evaluate the market, credit, and liquidity risks based on the identified smart betas.
- Constructed new ETFs to meet the target company's needs and hedge risks.

Experience Highlights

Teaching Assistant
University of Toronto, Toronto, ON   June 2020 - Aug. 2020
- Developed leadership acumen and excellent interpersonal communication skills by advising students regarding corporate finance related questions and assisting professors.
- Effectively communicated with students to advise corporate finance related questions online and received great feedback.

Finance Research Assistant
University of Toronto, Toronto, ON   May 2019 - Aug. 2019
- Gathered a large volume of index fund and ETF data using different platforms to review funds' performance and analyze innovative investing opportunities.
- Conducting due diligence on fund prospectus documents filed with the Stock Exchange Commission to ensure data and information accuracy.
- Interpreted data using solid logic and analytics techniques to extract data insights and investment proposal.

Extracurricular Activities & Volunteer Work

Sponsorship Coordinator
Chinese Students and Scholars Association, Toronto, ON   Sep. 2019 - Sep. 2020
- Initiate and manage fundraising activities within GTA, handling a budget of more than $20,000.
- Collaborated with sponsors and other stakeholders to maintain harmonious business relations.
- Developed partnerships with Hainan Airlines, Bank of China, and other companies to raise money for new student events.

Student Advisor
House of Representatives – Robinson House, Toronto, ON   Sep. 2017 - May 2018
- Advised and mentored more than 60 students to provide support for their academic studying, residence, and social life.
- Attend bi-weekly meetings to collaborate with colleagues to plan social events.

Skills & Interests

Programming: Python Programing, R Programing Language, SAS Base Programing for SAS9.

Languages: English (Advanced), Mandarin (Native)

Current member in Women in Capital Markets