

# 刘洁睿

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## 教育经历

上海财经大学 本科 商学院 工商管理专业

中国·上海

- 成绩: 83/100 (排名: 前 25%)
- 荣誉: 2023-24 优秀毕业生, 上海财经大学;
- 奖学金: 2022-23 人民奖学金, 二等奖, 上海财经大学; 2021-22 人民奖学金, 三等奖, 上海财经大学
- 主修课程: 战略管理 A、运营管理 A、财务会计 A、金融机构与金融市场 A-、数据挖掘 A-、统计学 A- 等

2020.09 – 2024.06

香港科技大学 交换 商学院

中国·香港

- 主修课程: 商业建模与优化 A、微观经济学 A-、商业法 B+ 等。

2023.01 – 2023.05

## 实习经历

摩根士丹利证券(中国)有限公司

Morgan Stanley

中国·上海

法律合规部 合规实习生

2024.02 – 至今

- 开展证券公司投资银行业务相关的法律法规的有关研究, 定期撰写监管动态简报。不定期对比分析法律法规的变化及更新, 整合生成完整研究报告, 为完善证券公司内外部合规流程提供指导。
- 协调开展公司日常合规反洗钱管理工作, 熟悉投资银行反洗钱审核流程, 利用 Dow Jones 平台进行全球各类制裁名单筛查, 确保客户及关联方的合规性。辅助公司法律部门和董事会办公室开展日常工作。
- 协助部门调研各类金融产品业务牌照资格, 包括股票、债券及金融衍生品等提供相关法律法规支持。

毕马威企业咨询(中国)有限公司

KPMG

中国·上海

风险咨询 精算业务实习生

2022.11 – 2022.12

- 参与保险公司(宏利、汇丰等)风险咨询项目, 整理有关 IFRS17 会计准则以及合同的资料并进行归档;
- 理解有关保险公司财务数据的深层逻辑, 利用 Excel 等数据分析工具整理和清洗相关财务数据, 核对财务数据月度的完整性, 定期补充新增保单信息, 以实现风险管理。

安永华明会计师事务所(特殊普通合伙)

Ernst & Young

中国·上海

审计 数据分析实习生

2022.07 – 2022.08

- 借助 Excel, Alteryx 自主编写脚本对财务数据进行分析, 识别数据中潜在风险。曾在某 IPO 项目中自主构建灵活的脚本对数据进行清洗, 处理过超 5 亿行的财务数据, 产出风险报告, 为安永审计团队提供支持;
- 参与不少于 5 个审计项目, 协调客户与审计团队需求, 获取数据并协调项目团队的工作, 以识别审计风险。

## 项目经历

中信建投证券股份有限公司

中国·北京

电力设备与新能源 行业研究(远程)

2023.05 – 2023.08

- 搜集和规整光伏行业产业链大量数据, 维护行业数据库, 搭建并优化财务分析模型, 对光伏产业链各环节的产品搭建财务模型进行定性和定量分析;
- 参与行业调研与访谈, 研究期间撰写不少于 20 份会议纪要, 善于挖掘、总结、归纳行业内部信息。撰写日报、周报, 研究期间参与光伏玻璃行业某公司研究报告撰写。

基于用户行为聚类的航空公司营销策略分析

中国·上海

数据挖掘课程项目 主要负责人

2022.10 – 2022.12

- 对数据集进行数据预处理和探索性分析, 根据数据的特点对数据进行数据清洗和归一化, 挖掘其内在关系;
- 基于基本的营销 RFM 模型和现有数据集, 引入新的变量, 利用 K-Means, DBSCAN 和层次聚类等方法进行聚类分析, 并进行聚类效果评价, 最终根据聚类结果, 分析并总结了公司未来营销策略发展方向。

## 相关证书

比赛: 2023 年德勤数字化精英挑战赛-季军; 2022 年欧莱雅 Brandstorm 商赛 Top 200;

语言: 英语: 雅思 IELTS 6.5 (6); 普通话: 一级乙等;

技术: 熟练掌握 Python (NumPy, Pandas), MySQL, Microsoft Excel, Alteryx 等数据分析工具。

# Jierui (Jerry) Liu

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## EDUCATION

### Shanghai University of Finance & Economics

*Bachelor of Business Administration, Management*

**Shanghai, China**

Expected Jul.2024

**GPA:** 83/100 (Ranking: Top 25%)

**Honors:** 2022-23 the 2<sup>nd</sup> Prize Scholarship at Shanghai University of Finance and Economics

**Courses:** Financial Accounting *A*, Managerial Accounting *A*, Data Mining *A-*, Statistics *A-*, etc.

### The Hong Kong University of Science and Technology

*Exchange Student, Business School*

**Hong Kong, China**

Jan.2023 – May.2023

**Courses:** Business Model and Optimization *A*, Microeconomics *A-*, Business Law *B+*, etc.

## PROFESSIONAL EXPERIENCE

### Morgan Stanley Securities (China) Co., Ltd

*Compliance Intern | Legal & Compliance*

**Shanghai, China**

May.2023 – Aug.2023

- **Policy Research** – Researched laws and regulations related to the investment banking business, Studied regulatory documents issued by the regulator, and wrote reports biweekly. Periodically compared and analyzed the updates of regulations to guide for improving the compliance process of the company.

- **Anti-money Laundering** – Assisted the company's anti-money laundering (AML) management, and conducted global sanction list screening through Dow Jones to ensure the compliance of customers and their related parties. Assisted the legal and the office of the Board of Directors in carrying out daily work.

- **Financial Markets** – Assisted in investigating the market access license qualification of various financial products, including stocks, bonds, and financial derivatives.

### KPMG Advisory (China) Limited

*Actuarial Business Intern | Risk Consulting*

**Shanghai, China**

Nov.2022 – Dec.2022

- **Consultancy** – Participated in consulting projects for major insurance companies (e.g., Manulife, HSBC, etc.) by actively engaging in conferences to meet customer needs and enhance client satisfaction.

- **Risk Management** – Analyzed and interpreted financial data of insurance companies using Excel and other tools. Assessed the integrity of financial data monthly, ensuring effective risk management.

### Ernst & Young Hua Ming LLP

*Data Analytics Intern | Assurance*

**Shanghai, China**

Jul.2022 – Aug.2022

- **Data Analytics** – Utilized Excel and Alteryx to analyze customers' financial data. Analyzed over 500 million rows of data in an IPO project, and generated auditing risk management reports.

- **Audit** – Participated in more than 5 audit projects, collaborating with clients' financial departments and Ernst & Young audit teams to identify and mitigate audit risks throughout the procedures.

## PROJECT EXPERIENCE

### China Securities Company Limited

*Equity Research (Remote) | Solar Energy Team*

**Beijing, China**

May.2023 – Aug.2023

- **Database Maintenance** – Collected and maintained data related to Solar Energy. Independently built financial analysis models for both qualitative and quantitative analysis, handling over 10 databases.

- **Desk Research** – Assisted more than 20 interviews and wrote meeting summaries. Authored daily and weekly reports and contributed to an in-depth company research report on the market of PV glasses.

### Analysis of Airline Marketing Strategies Based on User Behavior Clustering

*Curriculum Project in Data Mining*

**Shanghai, China**

Nov.2022 – Dec.2022

- **Data Mining** – Conducted data preprocessing and exploratory analysis. Utilized K-Means clustering methods to evaluate clustering effects and gain a deeper understanding of the data.

- **Business Analytics** – Summarized the characteristics of various user clusters based on the clustering results and developed marketing strategies for each cluster leveraging marketing principles.

## SKILLS & ACTIVITIES

**Competitions:** 2023 Deloitte Digital Camp – The Third Prize, 2022 L'Oréal Brandstorm – Top 200

**Skills:** Python (NumPy, Pandas), MySQL, Microsoft Excel, Microsoft PowerPoint.

**Languages:** Fluent in Mandarin, Conversational Proficiency in English (IELTS 6.5)