

# 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%)

2020.09 – 2024.07

• 奖学金: 2022-23 上海财经大学人民奖学金, 二等奖

2021-22 上海财经大学人民奖学金, 三等奖

• 主修课程: 战略管理 A、财务会计 A、劳动法与劳动关系 A、数据挖掘 A-、统计学 A- 等

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

合规部 日常实习生

2024.02 – 至今

• 日常追踪与证券公司机构管理及投行业务相关的国家法律法规, 定期撰写监管动态简讯, 针对法律法规的变化进行对比分析, 对特定的主题开展政策研究工作;

• 辅助部门其他员工, 起草内部规章制度的初稿, 开展公司内部日常合规管理工作。

毕马威企业咨询(中国)有限公司

KPMG

中国·上海

风险咨询 日常实习生

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 会计准则以及保险合同资料并进行归档;

• 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, 以实现合规与风险管理。

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 审计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

• 搜集和整理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, 实习期间撰写不少于 20 份会议纪要, 善于挖掘、归纳行业内部信息。撰写日报、周报, 曾深度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), SQL, Microsoft Excel, Alteryx 等数据分析工具。

# Jierui (Jerry) Liu

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## EDUCATION

### Shanghai University of Finance & Economics

Shanghai, China

*Bachelor of Business Administration, Management*

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  
• 2021-22 the 3<sup>rd</sup> Prize Scholarship at Shanghai University of Finance and Economics

**Courses:** Financial Accounting A, Strategic Management A, Labor Law A, Data Mining A-, Statistics A-

### The Hong Kong University of Science and Technology

Hong Kong, China

*Exchange Student, School of Business and Management*

Jan.2023 – May.2023

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

## PROFESSIONAL EXPERIENCE

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

Shanghai, China

*Off-Cycle Intern | Legal & Compliance*

May.2023 – Aug.2023

- **Policy Research** – Tracked national laws and regulations related to investment banking, regularly wrote regulatory updating reports, made comparative analyses of changes in laws to generate reports.
- **Internal Control** – Drafted the internal rules and regulations, and carried out daily compliance management work within the company.

### KPMG Advisory (China) Limited

Shanghai, China

*Analyst Intern | Risk Consulting*

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

Shanghai, China

*Data Analytics Intern | Assurance*

Jul.2022 – Aug.2022

- **Data Analytics** – Utilized Excel, 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 over 5 audit projects, collaborated with clients' financial departments and Ernst & Young audit teams to identify and mitigate audit risks throughout the procedures.

## PROJECT EXPERIENCE

### China Securities Company Limited

Beijing, China

*Equity Research (Remote) | Solar Energy*

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** – Conducted 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

Shanghai, China

*Curriculum Project in Data Mining*

Nov.2022 – Dec.2022

- **Data Mining** – Conducted data preprocessing and exploratory analysis. Developed new variables and implemented cluster analysis based on the RFM model in marketing theory. 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), SQL, Microsoft Excel (Pivot Table, Functions)

**Languages:** Native in Mandarin, Business Proficiency in English (IELTS 6.5), Basic in Cantonese.