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| **Kerwin** xiang **liao** |  | https://kerwinliao.github.io/ | www.linkedin.com/in/kerwinlau/ | kerwin.p.lau@gmail.com |
|  | Profile | | |
| Data-driven researcher specializing in quantitative modeling, financial analysis, and investment research. Expert in Python, R, and SQL for data-driven decision-making. Experienced in computational simulations and leveraging data-driven insights for strategic decision-making. Previously at Morningstar, applying financial analytics and product management expertise to enhance business outcomes. | | |
| Key skills |  | WORK EXPERIENCE | | |
| * Python, R, SQL, Excel * Statistical Analysis: Regression, Panel Data, Network Analysis * Investment Research & Market Analysis * Product management & cross-functional collaboration * Efficient project & time management * Literature review & synthesis for data-driven insights * Organizational adaptation & firm performance analysis * Computational simulation (Agent-Based Models, NK models) |  | Quantitative Researcher, Doctoral Student University of South Carolina, Darla Moore School of Business Aug 2021 – Aug 2025  * Conducted statistical modeling (regression, panel data, network analysis) to analyze firm performance and market adaptation. * Developed Python web scrapers to collect unstructured data, preprocessing and analyzing text to create a structured ~50K dataset for firm performance insights. * Reviewed academic and financial literature, synthesizing data-driven insights applicable to investment and corporate strategy. * Developed and implemented computational simulations (Agent-Based Models, NK models) to study market efficiency and strategic decision-making. * Sole lecturer for IBUS 301 – Introduction to International Business, leading discussions and explaining complex business concepts.  Research Assistant Chinese Academy of Financial Inclusion | Beijing, China Jan 2020 – Jun 2021  * Assisted in field research for the Financial Diaries China project, collecting and analyzing real-world financial behavior data. * Cleaned and processed large-scale survey data from field researchers, ensuring accuracy and consistency for analysis. * Maintained and optimized the database and backend code for a Mini Program, improving data accessibility and usability.  Operations Analyst, Level II Support, Direct & Reporting Morningstar, Inc. | Shenzhen, China Sep 2017 – Jul 2018  * Provided technical support and client advisory for Direct, a widely used financial advisory software, resolving issues related to asset flows, performance reporting, and custom data calculations. * Collaborated with the product team to enhance software features based on client feedback, improving usability and functionality. * Diagnosed complex client issues, identified the responsible teams, and ensured timely resolution by coordinating cross-functionally.  QA Automation Engineer, Manager Research Morningstar, Inc. | Shenzhen, China Nov 2015 – Sep 2017  * Built a Python-based monitoring tool that enabled developers to quickly identify root causes of server failures, reducing resolution time. Automated weekly reports improved cross-team collaboration and issue tracking. * Developed and maintained automation test scripts using Agile methodologies, enhancing test efficiency and software quality. * Created and executed test cases for new features and regression testing across multiple platforms in an Agile development environment. * Conducted manual and scenario-based testing, ensuring product reliability and alignment with Agile sprints. * Logged, tracked, and prioritized software defects in JIRA, collaborating with developers to drive timely resolutions.  Data Research Analyst Morningstar, Inc. | Shenzhen, China Sep 2014 – Nov 2015  * Researched and analyzed global ETF data, focusing on fund composition, index tracking performance, and market trends. * Worked with portfolio and index data to ensure ETF performance reporting accuracy and resolve discrepancies in fund tracking methodologies. * Collaborated with internal and external teams to resolve index fund data quality issues, improving data reliability. | | |
| **Certifications** |  |
| * Bloomberg Market Concepts (BMC), 2022 * CFA Level 1 Exam Attempted, 2017 * MIT XSeries, Foundations of Computer Science, 2016 |  |
| Activities and interests |  |
| * Writing novels * Learn new languages * Tea art * Cooking & Great food * Outdoor activities * Philosophy * Composing popular music |  |
|  | education | | |
| Master of International Business (en route to PhD) University of South Carolina, Darla Moore School of Business Aug 2021 – Aug 2025Master of Science in Economics Chinese University of Hong Kong, Shenzhen Finance Institute Sep 2018 – Nov 2019Bachelor of Management, Administrative Management University of International Relations  Sep 2010 – Jun 2014 | | |