



Summary of Qualification

- o Practical experience in manipulating large datasets, work effectively with different data source to perform data analysis and reporting.
- o Familiar with portfolio management practice and risk management concepts; able to understand and interpret complex regulations and guidelines.
- o Solid understanding of data analysis life cycle and software development life cycle; able to bridge business requirements with analytical and development solutions.
- o Strong time management capabilities, with the ability to perform multiple projects and prioritize work.
- o Strong problem-solving skills, coordination skills, and interpersonal skills. Outstanding verbal and written communication skills. Communicates easily with various stakeholders such as C-level executives, technical team, internal and external clients.
- o Day-to-Day toolsets: Python, SQL, VBA, SAP Crystal Reports
- o Project-Specific exposures: Java, SAS, R, Tableau
- o Sample code: <https://github.com/maoyuanli>

Professional Experience

Senior Developer/Analyst (Reporting & BI). CNA Canada (2018 August – Present)

- o Engage business users for report and data analysis requirements.
- o Analyze business logic and translate business requirements into reporting solution.
- o Leverage tools such as Python, SQL Server, VBA, Power Query and Crystal Report to develop ad hoc reports as well as automated/scheduled reports.
- o Test, review reports and share findings with business users in an agile environment.
- o Maintain and update reporting repository and documentation.

Business Analyst. Lockfield Technology (2017 August – 2018 July)

- o Engage stakeholders for project objectives and interpret the business needs into analysis plan and data requirements.
- o Identify data resources, perform data preparation such as cleaning and subsetting using R and Python.
- o Perform ETL process using SAS EG and SSIS in Microsoft Visual Studio.
- o Collaborate with SME and data scientist to ensure data modeling meets business intent and provide business value.
- o Perform data exploration, data mining, statistical modeling in regression, clustering and classification with Python.
- o Perform model testing and ensure that the business requirement is fully aligned with the data modeling process.
- o Give meaning to data in visualization and reporting phase utilizing tools such as Tableau.
- o Rewrite data preparation code with tidyverse and rewrite visualization code with ggplot2.
- o Develop reproducible reports with R Markdown.
- o Develop SAS Macro programs to improve coding and reporting efficiency.
- o Automate UAT with Python, Selenium Webdriver and to track issues in effective manner.

Quality Assurance. RBC Investor and Treasury Service (2016 Dec – 2017 Apr)

- o Scrutinize transaction data input including account set-up, purchases, switches, Automatic Withdrawal, Pre-authorized Contribution for RRSP, TFSA, LIRA, and cash accounts.
- o Engage data processor to correct the error and ensure all transactions are processed within SLA.
- o Document processing defects in issue tracking system and evaluate resubmitted trades based on acceptance criteria.
- o Follow up reconciliation and settlement of daily trades.
- o Perform closure activities such as archiving and knowledge transfer.
- o Remain up-to-date with mutual fund industry standards, principles, and practices.

**Fixed Income Trader.** China Merchants Fund (2011 Jun – 2016 July)

- o Perform market research, analyzes market conditions and work with portfolio managers to learn investment ideas.
- o Bridge the investment ideas and implementation by accurately identifying trade opportunities.
- o Manage daily trading to ensure timely execution and regulatory compliance.
- o Engage portfolio managers and compliance department for regular and ad-hoc report requirements.
- o Collect and transform data from various trading platforms and third-party information providers.
- o Generate daily P&L reports and periodic reports using VBA and SQL.
- o Collaborate with IT department to improve the trade execution process and the quality of reports.

Reporting Analyst. China Merchants Fund (2006 Jun – 2011 May)

- o Engage regulatory agencies for compliance reports requirements.
- o Engage management team for company-wide KPI reports requirements.
- o Collaborate with internal stakeholders such as compliance department, finance department, investment teams and sales teams to collect data in accordance with requirements.
- o Generate and deliver reports in MS Excel, Word and PowerPoint formats.
- o Liaison with external consultants and developers to automate the reporting process.

Professional Accreditation & Membership

Oracle University:

- o **Oracle Certified Professional, Java SE 8 Programmer (Certificate Serial Number: 257715249OCPJ)**

SAS Institute:

- o **SAS Certified Advanced Programmer (Certificate Serial Number: AP021827v9)**

CFA Institute:

- o **CFA Charterholder (Charter Number:196460)**

Canadian Securities Institute:

- o **Canadian Securities Course(CSC®)**

Education

Sheridan College (2018)

- o **Data Science Certificate**

The curriculum includes:

- ✓ The fundamentals of data science and predictive modeling
- ✓ Advanced statistical concepts
- ✓ The application of tools and technologies related to data mining and analysis
- ✓ Impactful strategies for presentation of data and outcomes

University of Leeds, United Kingdom (2004 – 2005)

- o Master of Law (LL.M) in International Business Law

Southwest University of Political Science and Law, China (1999 – 2003)

- o Bachelor of Law (LL.B)

References are available upon request