

**Yingqi (Phoebe) Sun**  
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## EDUCATION

### The University of Chicago

**Chicago, IL**

*Bachelor of Arts in Economics, Minor in Data Science*

*Expected June 2023*

*GPA: 3.98/4.0, Phi Beta Kappa, Gary Becker Scholar, Robert Maynard Hutchins Scholar, Dean's List All Semesters*

*Coursework: Financial Accounting, Investments, Corporation Finance, Financial Statement Analysis, Trading, Intro to Money and Banking, Econometrics, Operations Management, Data Science, Machine Learning, Statistics, Calculus*

## PROFESSIONAL EXPERIENCE

### Morgan Stanley

**New York, NY**

*Credit Research Intern*

*June - August 2024*

- Rotated through High Yield, ESG, Investment Grade, Securitized, Macro, and Liquidity to gain investment skills and make recommendations to the PM team that are supported by bottoms-up fundamental research and financial modeling
- Recommended THOR Industries for strong FCF driven by strategic inventory management, effective capital allocation and attractive current value due to the RV down cycle: capital appreciation is expected as rate cuts improve RV sales
- Conducted ESG research on Caruna Networks Oy (Finnish electricity distributor) and granted a pass because of their substantial investments in clean energy transition and exceptional operating efficiency despite changes in regulations
- Pitched to buy UNH 30-yr bond: affected by the cyberattack, spread between UNH 53' and ELV 53' has compressed from 20 bps to 10 bps, but given strong fundamentals, cybersecurity concerns will fade and spread will return to 20 bps
- Delivered strategy to replicate KTB exposure with SGS for restricted portfolio using quantitative (correlation, tracking error, rolling beta, backtesting) and qualitative analysis (trading partners, macroeconomic trends, monetary policies)

### Morningstar

**Chicago, IL**

*Equity Indexes Intern*

*June - August 2023*

- Developed an equity research report on Faraday Future (EV start-up), accurately predicting a future reverse stock split and a significant drop in share price; report received praise from Morningstar's electric vehicle committee chair
- Delivered crucial industry insights to supervisor and clients via a 30-slide presentation and proposed targeted strategy for distinct regional needs, supported by important flow and AUM trends across APAC, NA, EU, and other markets
- Analyzed North America index funds to identify missed opportunities; leveraged data analysis results and collaborated with sales representatives to identify reasons for client losses and propose strategies to improve customer experience
- Performed competitor gap analysis on the Morningstar index lineup against MSCI, FTSE Russell, and S&P, identifying ability gaps and providing data-driven recommendations for product additions and enhancements
- Won the Intern Case Study Award for analyzing DEI policies at Morningstar with recommendations for improvements

### CITIC Securities

**Tianjin, China**

*Securities Sales Intern*

*July - September 2022*

- Strategically recommended mutual funds, fixed income, and multi-asset structured products based on the prevailing economic conditions, delivering consistent 5% annual returns even amidst severe market downturns due to COVID
- Secured 8 new customers through over 300 cold calls and evaluated their financial conditions and investment goals
- Analyzed global economy and market trends to create daily newsletters, highlighting the impact of macroeconomic factors on market movements and offering insightful future market predictions, with a focus on the U.S. and China

## LEADERSHIP & ACTIVITIES

### Smart Women Securities

**Chicago, IL**

*Investment Committee Member / Industry Leader / Senior Analyst*

*September 2021 - present*

- Presented analysis on Wayfair to the board, predicting a drop in share price due to unfavorable earnings under depressed housing market, which proved accurate when Wayfair stock plummeted after Q4-22 earnings release

### Trott Business Program

**Chicago, IL**

*Mentor*

*September 2022 - present*

- Mentored four undergraduates aspiring to enter finance and provided lessons on accounting, corporate finance, financial statement analysis, financial modeling, financial instruments, as well as networking and recruiting advice

## SKILLS & INTERESTS

**Language:** Mandarin (Native), English (Native, TOEFL: 120), French (Intermediate), Ancient Greek (Intermediate)

**Skills:** Bloomberg, AlphaSense, Aladdin, CreditSights, Python, R, STATA, SQL, Morningstar Direct, Excel, PowerPoint

**Interests:** Detective Novels, Cooking, Yoga, Sitcoms, Acting, Scuba Diving, Swimming, Rock Climbing, Gardening