

Zhuoyun (Iris) LI

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EDUCATION

Massachusetts Institute of Technology (MIT) - Cambridge, MA, USA

Jul 2023 - present

Sloan School of Management, Master of Finance, Feb 2025

- **Anticipated Coursework:** Advanced Corporate Finance, Financial Mathematics, Pro-seminar in Capital Markets, Financial Engineering, Options and Futures Markets, Financial Markets, and Fixed Income Securities & Derivatives
- **Clubs:** Investment management Club, Quantitative Finance Club
- **Awards:** MIT Sloan Stock Pitch Competition 2023 – 2nd Place
- **MIT Joint Project at State Street:** Investigated post-financial crisis trends in momentum and reversal factor returns

The Hong Kong University of Science and Technology (HKUST) - Hong Kong, SAR

Sep 2019 - May 2023

B.Sc. in Economics and Finance; First Class Honors; GPA: 3.87 (top 1%)

- **Honors:** The Dean's List Award (2019 - 2022); Recipient of The University Scholarship and Regional Scholarship
Lifetime Member of Beta Gamma Sigma international business honor society
- **Research:** Empirical Test of the Validity of Capital Asset Pricing Model in Hong Kong Stock Market
- **Professional courses:** Microeconomic A+; Statistics A+; Econometrics A+; Probability A

PROFESSIONAL EXPERIENCE

Bank of America

Hong Kong

Summer Analyst – Global Markets, Sales and Trading

Jun - Aug 2024

- Rotated across Equity Derivatives, Delta 1, and Credit Trading teams, acquiring in-depth experience with option strategies, structured products, time series analysis, and distressed debt evaluation
- Developed VBA and Python automation tools to optimize trading operations, authored morning notes summarizing insights from daily FX and credit calls, and contributed to key projects including AT1 bond pitches, CDO term sheet drafts, and delivering the final presentation on an arbitrage strategy for pairs trading

MIT Joint Finance Lab Research Project - Tradeweb

New York, USA

Quant Researcher, Sloan School of Management

Dec 2023- Feb 2024

- Conducted in-depth analysis of U.S. corporate bond market utilizing TRACE data, focusing on trade patterns and electronic trading adoption
- Applied ARIMA-based time series modeling to evaluate the temporal dynamics between TRACE prints, critically assessing model suitability and identifying analysis limitations

China International Capital Corporation (CICC)

Hong Kong

Investment Banking Intern - M&A Group

May - Jul 2023

- Supported due diligence on potential iron ore project acquisitions; prepared teaser for a food and beverage project
- Conducted in-depth market trend analysis and research to identify and evaluate M&A opportunities for a cosmetics company with the market value exceeding 200 billion
- Contributed to weekly reports tracked global M&A transactions, focusing on in-depth analysis of selected deal cases

Goldman Sachs

Hong Kong

Summer Analyst - Private Wealth Management

Jun - Aug 2022

- Provided market updates with macro and market views, evaluated solar industry size and investment opportunities, and made final stock pitch presentation to MDs and VPs
- Supported due diligence process on private equity transaction of a pharma company, conducted evaluation and analysis
- Assisted in the ideation and implementation of Asia digital solutions and delivered the group presentation

HSBC

Hong Kong

Corporate Banking Intern - Global Trade and Receivables Finance

Jan - Jun 2022

- Developed new revenue streams and strategic sales initiatives for the Asia Pacific in Service Trade; worked on asset forecasting and ESG fund projects; supported GTRF contribution to relevant investment frameworks in regional team
- Participated in five projects related to wallet share and triggers of performance growth, including STF Triggers NLP Analysis, Commodity (Russia War) Analysis, and Healthcare Sector Report

ADDITIONAL INFORMATION

- **Skills:** Python (Python and Statistics for Financial Analysis Certificate), VBA, R, Thomson Reuters Eikon, Bloomberg (Bloomberg Market Concepts Certificate), Dealogic
- Participated in J.P. Morgan and Citi APAC Investment Banking Virtual Experiences
- **Languages:** Mandarin (native), English (fluent), Cantonese (basic)
- **Interests:** Guzheng (Level 8); chess; golf; squash; hold'em