**Nicholas Li**

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**SUMMARY OF QUALIFICATIONS**

* Possess Master’s Degree in Economics and Bachelor’s Degree in Financial and Business Economics, also a CFA Level II candidate
* Motivated self-starter with a strong work ethic and ability to work well both independently with minimal supervision as well as in a team
* Strong ability to adapt to changes in a fast paced environment and adjust to changing business priorities
* Excellent critical thinking and problem-solving skills acquired through data analysis, data manipulation and self-directed portfolio management
* Proficient in Microsoft Office Suite (particularly Excel and PowerPoint), SAS, R, Python, Tableau, SQL and Bloomberg
* Ability to see the big picture in large amount of data and able to make succinct recommendations
* Strong multi-tasking, organizing and communication skills with the ability to effectively communicate with stakeholders in a professional manner

**professional experience**

**Market Data Risk Analyst (Contract)** **Dec. 2018 – Apr. 2019**

TMX Group

* Using Python and SQL, pioneered the design and construction of client information and TSX Venture market data which improved data accuracy by 12%
* Validated data for over 40,000 accounts from Salesforce and analyzed portfolios using Excel and Tableau
* Performed analysis on market data and made recommendations on possible investments and proposed ventures
* Built logistic regression model to assess the impact of economic factors such as interest rate fluctuation, inflation rate on portfolio risk exposure
* Maintained strong internal stakeholder relationships such as sales and marketing team through regular touchpoint meetings

**Equity Research Analyst (Internship)** **Jun. 2012 – Sep. 2012**

GF Securities

* Initiated investment ideas to the management team on the CPG stock portfolio, which was implemented and achieved a 23% return over a 3-month period
* Conducted in-depth research and analysis on the CPG sector using data sourced from Bloomberg by leveraging a combination of Top-Down, Bottom-Up approaches and market indicators at various stages
* Designed and implemented a momentum analysis model which incorporated MACD, KDJ indicator, and Bollinger bands to analyze and predict future trends in growth stocks, this model improved accuracy of forecast by 17%

**PERSONAL INVESTED PORTFOLIO** **Apr. 2018 – Jun. 2018**

* Conducted market research by using Porter's Five Forces analysis and fundamental analysis on IT companies, and valuated three IT stocks using the FCFF model and multiples analysis
* Calculated cost of equity, before-tax margin cost of debt, and beta based on the CAPM theory
* Performed Free-Cash Flow and WACC calculations using Excel on data collected from Bloomberg and Yahoo Finance

**education**

**Master of Economics, York University Sep. 2017 – Jun. 2018**

**Bachelor of Financial and Business Economics Jan. 2014 – Jan. 2017**

• Provide competitive market research and analysis directly used to change daily pricing strategies of our Home Equity Financing products

• Responsible for authorizing pricing exceptions above unit head authorization levels for retail, private banking and wealth management

• Optimize and model data reports from internal and third-party sources to provide meaningful measurements used to adjust product strategy