ALICE LIU

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SUMMARY OF SKILLS

- Technical skills: Python, PySpark, Q, Matlab, SQL, VBA, R, HTML, Pivot, UNIX and Scheme.
- Extensive experiences with Tableau, Bloomberg, Refinitive Eikon, S&P Capital IQ, AWS, Databricks, kdb+, Oracle Database, Enerdata, Git, EViews, Rimes, Barclays Live, JIRA and Jenkins.
- Proficient in Microsoft Office software – Excel, Word, Access, Outlook, SQL Server and PowerPoint.
- Strong portfolio management, financial and data analysis, modelling and forecasting skills.
- Motivated, curious, reliable and creative.

EXPERIENCE

Manager | June, 2021 - Present
Canada Pension Plan Investments, Business Intelligence - **Toronto**, **ON**

- Leverages domain knowledge in public markets and proficiency to work with big data to provide complex analysis on international movements and the impacts on the fund.

- Works collaboratively and effectively with internal parties to lead initiatives in creating investment-driven analytics. Created and manages multiple Tableau dashboards with big data and cloud technology; dashboards have proven to provide useful insights to all and individual departments for analysis, budgeting and forecasting purposes.

- Continuously build excellent partnership with international partners through clear communication and high performance. Oversees international financial reporting analytics to influence strategic decision-making and planning.

- Oversees, compiles, analyzes and reports on the fund's key business performance through operating metrics for portfolios and attributions.

- Recruited and trained qualified candidates to fill open positions and maintain coverage of roles. Manages and develops Senior Analyst through constructive feedback and reviews.

- Member of MindMatters, Inclusion & Diversity Council and OUT.

Associate | Apr, 2020 – June, 2021
Analyst | Sept, 2018 – Apr, 2020
Canada Pension Plan Investments, **Total Portfolio Management – Toronto, ON**

- Worked with internal investment departments and external vendors, such as Bloomberg and Barclays, to identify key data points to better reflect the daily and long-term movements of the market; self-learned Tableau to design and create the Market Overview Dashboard to support the fund's short-term, mid-term and long-term investments.

- Lead the climate change initiative in researching and developing a public sentiment-based signpost to be used in the signpost framework and Climate Change Dashboard.

- Created advanced computations for the real estate sector, government bonds, commodities, ESG indices and policies with PySpark, which provided useful research analyses for the Research Team and the Economics Forecast Team.

- Worked with AWS applications to automate the extensive pipeline of the data delivery for the company wide Quarterly Economic Forecast; at the same time, enhanced the data coverage with in-depth analyses of equity and fixed income indices.

- Self-learned Python to build the Platform for Strategic Insights (PSI) for improving access to, and utility of the scalable compute platform across the department, as well as streamlining and simplifying data access across the entire organization.

Senior Intern Analyst | Sept, 2017 - Dec, 2017
Intern Analyst | Jan, 2017 – Apr, 2017
Canada Pension Plan Investments, **Total Portfolio Management – Toronto, ON**

- Self-learned Q programming skills to work on research and ad-hoc requests for market and fundamental data to support various research teams.

- Advanced the evolution of asset allocation and investment decisions by ensuring the research tools are adapted accordingly and that required research data sets are available.

- Identified and presented trends observed in the equity market to assist with private equity valuation and peer analysis.

- Assisted in enhancing the allocation process by building a new research environment that integrates all major components of various models used by the organization.

Financial Analyst (Intern) | Dec, 2015 – Aug, 2016
CGI Group – Markham, ON

- Created financial models to forecast net revenue, resource utilization rates, and analyze other key financial figures that were contributed to the Canada Cabinet and Global Operations presentations.

- Created a 3-year real estate business plan for the building that was put in use for expanding the Markham, ON location.

- Worked on the Bell Canada team and created weekly reports on 8 Business Verticals of their performances, projects, budgets, compliances and trainings.

- Created the Manager Scorecard with SQL and Microsoft Access, an evaluation of all 85 Directors and 16 Vice Presidents of the Greater Toronto Area Business Units; Scorecard consisted of performance metrics and member management analytics.

EDUCATION

Bachelor of Mathematics | Sept, 2013 – Aug, 2018
University of Waterloo

- Mathematics/Financial Analysis and Risk Management, Honors, Co-op
- Executive of the University of Waterloo Finance Association and Animals Lover Club

RELEVANT PROJECTS

Certifications and accomplishments

- **Udemy:** Spark and Python for Big Data with PySpark
- **Coursera:** Machine Learning by Google Cloud
- **Coursera:** What is Data Science? By IBM
- **CGI:** Art of Consulting
- **CFA Institute**: CFA Program participant, completed Level 1 in 2019

New Venture Project - Wilfrid Laurier University

- Developed a business plan for an automated coat-checking system; presented it to business students, TAs and professors at the Wilfrid Laurier University and received positive feedback.

VOLUNTEER WORK

Director of Fundraising and Marketing | Jun, 2021 - Present
Hand Up Toronto

- Manages a team of 7 volunteers that are made up of other working professionals.

- Develops effective and feasible fundraising and marketing strategies to achieve goals for continuous support of the community that the charity serves.

- Oversees all related activities and acts as a liaison with donors, partners, foundations and organizations.