

# Zhuoran (Will) Li

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Brisbane, Australia

## OBJECTIVE

Aspiring to further my research and expertise at the intersection of finance and AI, I have successfully passed all levels of the CFA and FRM exams,—achieving this milestone at the age of 22—underscoring my commitment to excellence in financial analysis and risk management. My current work focuses on empirical asset pricing, quantitative analysis, and constructing granular datasets to enhance financial decision-making. I aim to leverage my analytical and technical skills in AI applications for finance.

## TEACHING

### • University of Queensland

*Academic Tutor*

*Feb 2023 - Present*

Brisbane, Australia

- Taught FINM3405(Derivatives and Risk Management), RBUS4411(Applied Research Project), FINM7402(Corporate Finance), FINM7406(International Financial Management).
- Delivered on-site tutorials and developed comprehensive 12-week course materials for Master-level and Honours-level subjects.
- Assessed over 500 exam papers and various other assessments.

### • University of Melbourne

*Academic Tutor*

*Feb 2022 - Feb 2023*

Melbourne, Australia

- Conducted tutorials for Corporate Financial Decision Making (FNCE20005) for a finance major subject.
- Led 8 tutorial classes per week, engaging over 100 students.
- Produced detailed 12-week teaching materials and evaluated more than 900 assessments.

## EXPERIENCE

### • Shanghai Xiaojie Education Technology Co., Ltd

*July 2023 - Present*

*Trader & Trading Mentor*

Full-time; Hybrid Australia/China

- Employed a systematic, scientific approach to professional FX trading using harmonic patterns, institutional order systems, price action, and inside bar trading strategies.
- Maintained a frequency trading strategy with a risk-reward ratio of 1:2 and a winning ratio of 50%, achieving consistent profitability.
- Emphasized discipline, perseverance, and a strategic trading philosophy to establish a resilient trading mentality.
- Mentored aspiring traders by sharing methods, wealth, and wisdom, integrating these practices into an educational culture.

### • Wechat Official Account

*Content Creator & Author*

*Dec 2020 - Present*

Hybrid Australia/China

◦ WeChat Official Account ID: will\_li\_finance

- Authored over 160 articles on money management, macroeconomic events, and buy-side research.
- Developed a dedicated chapter “Trading insights” featuring daily trading routines and trading philosophy, with an average of 1000 reads per article.
- Maintained an annual 30,000-word record of personal development as part of a long-term goal spanning 50 years, aimed at documenting my growth and establishing a legacy for future generations; preparing to publish the first chapter of my memoir in my early to mid-20s.
- Grew the subscriber base to over 2000.

## EDUCATION

### • The University of Queensland, Australia

*Apr 2024 - Present*

*Doctor of Philosophy in Finance*

Brisbane, Australia

- Research Areas: Empirical Asset Pricing, Fintech, Cybersecurity, Investment, Asset Management Institutional Background, Big Data Applications in Finance.

### • University of Melbourne, Australia

*Jul 2021 - Dec 2022*

*Master of Finance*

Melbourne, Australia

- Achieved First Class Honours in all major subjects; awarded International Graduate Merit Scholarship (25% tuition fee remission).
- First Class Honours (H1)

### • The University of Queensland, Australia

*Feb 2019 - Jun 2021*

*Bachelor of Commerce*

Brisbane, Australia

- Finance and Accounting GPA: 7/7 (Top 1%); shortlisted for Valedictorian; 6 times Dean’s Commendations.

## PROJECTS

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### • Working Paper: The Impact of Indexing on Mutual Fund Performance

Working Paper [⊕]

*Data: US domestic equity mutual funds; Methods: Recursive de-means estimator*

- Empirically examines the effects of indexing on mutual fund performance.

- Key findings include the absence of market timing abilities and a negative relationship between fund size and performance.

### • Institutional Background of Asset Management Industry

April 2024 - Present

*Data: SEC filings, Methods: LLM, textual analysis*

- Use LLMs and GPT API services to construct textual data

- Use AI-based approach to construct agents and workflow to systematic fetch data on a daily basis

## SKILLS

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### • Programming Languages: Python (Advanced), R (Advanced), LaTeX(Advanced)

### • Research Skills: Academic Writing, Coding, Econometrics, Critical thinking, Database management

## HONORS AND AWARDS

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### • International Graduate Merit Scholarship

Jul 2021 - Dec 2022

*University of Melbourne*



- 25% tuition fee remission awarded for outstanding academic performance.

### • Dean's Commendation for Academic Excellence

Feb 2019 - July 2021

*The University of Queensland*



- Recognized 6 times during undergraduate studies.

## CERTIFICATIONS

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### • CFA designation

Oct 2025

### • CFA Level I, II, III Passed

Nov 2022

### • FRM Part I, II Passed

July 2022

## ADDITIONAL INFORMATION

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**Languages:** English (Full Working Proficiency), Chinese (Native)

**Interests:** AI Applications in Finance, Quantitative Trading, Empirical Asset Pricing, Big Data Analytics

## REFERENCES

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### 1. Dr. Min Zhu

Associate Professor, Finance

The University of Queensland

Email: [m.zhu@business.uq.edu.au]

*Supervisor*

### 2. Prof. Denis Leung

Professor of Statistics, School of Economics

Singapore Management University

Email: [denisleung@smu.edu.sg]

*Co-Supervisor*