

Jason Zhang

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EDUCATION

Southern Methodist University, Cox School of Business

Dallas, TX

Master of Science in Business Analytics

May 2025

Cumulative GPA: 3.925/4.00

GRE: 312

University of Waterloo

Waterloo, Canada

Bachelor of Mathematics in Financial Analysis and Risk Management

Jun 2024

Cumulative GPA: 3.28/4.00

TECHNICAL SKILLS

Python, R, HTML, CSS, JavaScript, SQL, Advanced Excel, Expert Level in Microsoft Office Suite, Linux, Bloomberg Terminal, Power BI, FactSet

ACADEMIC PROJECTS

Merger and Acquisition Analysis for Sleep Cool

Aug 2024 – Oct 2024

- Evaluated the future prospect of an acquisition for a mattress company
- Analyzed data by employing statistical testing to derive data-driven decisions and present the eventual business analysis

Equity Valuation Project for SeaWorld Entertainment

Jan 2023 – May 2023

- Use Discounted Cash Flow and Free Cash Flow to Firms to value the fair price for SeaWorld's common equity
- Create and deliver a complete presentation of the valuation processes and conclusions

CERTIFICATIONS

Chartered Financial Analyst Program

Passed Chartered Financial Analyst Program Level I, II Examinations

May 2024

- Passed CFA Level I, II Examinations on the first attempt in Nov 2023 and May 2024 respectively
- Developed financial modeling skills through analyzing financial statements, estimating free cash flows, and evaluating capital budgeting decisions
- Strengthened areas of weakness through self-study and review of quantitative methods, financial reporting, fixed income, and ethics

Microsoft Office Specialist: Expert (Microsoft 365 Apps)

October 2024

- Attained Microsoft Office Specialist: Expert certification, the highest level of Microsoft Office Specialist Program, demonstrating mastery of Microsoft Office Software
- Executed advanced data analysis using complex Excel functions, pivot tables, and data modeling for actionable insights
- Streamlined document creation through advanced Word automation and collaborative features while creating impactful PowerPoint presentations

ADDITIONAL INFORMATION

Languages: Fluent in English; Native Fluency in Mandarin Chinese

Certifications & Training: Bloomberg Market Concepts Certification

Activities: Volunteer at United Way, Eco Fair at the Barns, Toronto Marathon

Interests: Playing soccer, Reading, watching movies, Listening to classic music