Andy Zhang

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EDUCATION

University of Waterloo (David R. Cheriton School of Computer Science) — Waterloo, ON
Honours Bachelor of Computer Science, Software Engineering Option, GPA: 3.7/4.0 — *Sep 2016 – Aug 2021*

Wilfrid Laurier University (Laziridis School of Business and Economics) — Waterloo, ON
Honours Bachelor of Business Administration, Finance Concentration, GPA: 3.7/4.0 — *Sep 2016 – Aug 2021*

WORK EXPERIENCE

Waratah Capital Advisors — Toronto, ON
Private Equity Analyst — *Sep 2019 - Dec 2019*
- **M&A**: Worked as a part of a two-person real-estate PE strategy; participated in all aspects of the deal process, from constructing LBO and CCA tax schedule models, to preparing presentations, analysis, and forecasts for board and investment committee meetings.
- **Management**: Implemented and managed change across all portfolio resorts, such as digitizing leases and automating invoices.
- **Proprietary Analysis**: Compiled and leveraged a database of properties to gain quantitative insights on drivers of property pricing.

CI - Cambridge Global Asset Management — Toronto, ON
Research Analyst — *Jan 2019 - Apr 2019*
- **Equity Research**: Forecast future performance of companies and reviewed investment theses with portfolio managers and analysts.
- **Portfolio Analysis**: Worked with analysts, traders, and PMs to develop reports and data visualization tools on numerous logistical benchmarks, such as market and geographic exposure of funds, using VBA, FactSet, and Bloomberg.

Sample Research Project:
- Developed a model and an investment thesis for a global convenience goods company, incorporating regulatory risks, and performed due diligence through interviewing IR and the CEO, as well as industry experts; valued company with a DCF and a comparable multiple.

Blackhawk Network — Toronto, ON
Marketing Analytics Intern — *Jan 2018 - Apr 2018*
- **Data Analysis**: Created and prepared reports and models, such as forecasting promotional sales, conducting post promotional analysis, and optimizing planograms; analyzed trends to determine why sales for certain under-performing products are stagnant.

China Merchants Bank — Wuxi, JS
Corporate Banking Intern — *May 2017 - Aug 2017*
- **Pitching**: Wrote, edited, and delivered sales pitches for new financial products, both in English and Mandarin to over 1000 clients.

OTHER EXPERIENCE

Personal Portfolio — Toronto/Waterloo, ON
Trader — *Nov 2019 - Present*
- **Portfolio Management**: Managing a portfolio of stocks, options, and ETFs; developing screener using Python and brokerage APIs.

Case Competitions — Toronto/Waterloo, ON
Case Competitor — *Sep 2016 - Jan 2020*
- **Laurier JDCC 2020**: Trained and competed with Laurier's competitive case competition team, winning School of the Year for 2020.
- **Toronto McKinsey Challenge 2019**: Placed first out of over 400 applicants in recommending a policy for the Canadian tech economy.
- **Quantify Risk & Insurance Case Competition 2018**: Placed second out of the 25 teams selected to compete; constructed models on climate change risk to recommend a risk management solution.

Laurier Management Consulting Practicum — Toronto, ON
Pro Bono Management Consultant — *May 2019 - Aug 2019*
- **Consulting**: Developed a framework for assessing autism service delivery models and interviewed therapists from around the world.

Students Offering Support (SOS) — Waterloo, ON
Economics Instructor — *Sep 2018*
- **Teaching**: Prepared and delivered exam preparation sessions for the Introduction to Microeconomics course (EC 120); over 600 students attended the sessions, raising over $12,000 towards charity.

University of Waterloo Mathematics Society — Waterloo, ON
Vice President of Finance — *May 2018 - Sep 2018*
- **Finance**: Administered the Operating Fund, as well as the Capital Improvements Fund, totaling over $300,000.
- **Leadership**: Managed a team of 10+ Finance Directors to oversee the financial operations of the society.

OTHER INFORMATION

- **Relevant Courses**: Algorithms, Logic & Computation, Combinatorics & Optimization, Probability & Statistics, Economics, Financial Modelling (Marquee Group), Machine Learning (Stanford), Financial Engineering and Risk Management (Columbia), Deep Learning (deeplearning.ai)
- **Languages & Technical**: French (DELF B2 & French Immersion Certificate), Mandarin (Ontario Grade 12), C, C++, Scheme, VBA, MATLAB, R, Python (TensorFlow & Keras), SQL, HTML\CSS, Ruby on Rails, Shell Script, Git, Bloomberg, FactSet, CapIQ, LaTeX
- **Hobbies**: Poker, Reading (investing, philosophy & Stephen King), Music (from Paganini to JAY Z), Staying Active (hockey & gym)