

Zhuojun Liu



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EDUCATION

- The University of Hong Kong (HKU), Hong Kong / Master of Science** 2023.08-2024.07 (Expected)
- **Major (Programme):** Business Analytics
- The University of Hong Kong, Hong Kong / Bachelor of Science** 2018.09-2022.06
- **Major:** Double Majored in Decision Analytics (An interdisciplinary major covering Statistics, Mathematics and Computer Science) and Finance
 - **Achievements:** HKU Worldwide Undergraduate Exchange Student Scholarships, Mentor for Freshmen Students, Student Ambassador, Advanced Programme Admission
- University of California-Berkeley, California / HKUWWW Exchange Programme Exchange Student** 2019.06-2019.08
- **Achievements:** Studied Courses on Statistics and Mathematics. Graded A+ for the Credit Transfer Course
- Shanghai High School, Shanghai / High School Student** 2015.09-2018.06
- **Achievements:** Gaokao Top 1%, Provincial Level Contest Awards, AMC12 Top 5%

WORK EXPERIENCE

- Shanghai Massquant Asset Management, Shenzhen, Guangdong / Fund Operation Specialist** 2022.02-2023.08
- Worked on marketing and operation of quantitative hedge funds under the leadership of industry-renowned partners
 - Before clients' investment, completed due diligence reports for custodians, brokers, and 41 investors including proprietary funds and FOFs of securities (CICC Wealth Management, CITIC Securities, etc.), futures companies (Guotai Junan Futures, etc.), banks (China Merchants Bank, Ping An Bank) etc. Conducted roadshows for 4 of them
 - During investment, involved in the whole process of product issuance, including determining key product elements, signing tripartite agreements, product filing, opening trading accounts, assisting investors in placing orders and transferring funds, etc. Independently launched 6 products and jointly increased the AUM by about 3 billion Yuan together with colleagues. In addition, participated in the overall process of offline subscription of the issued shares in IPOs
 - After investment, conducted statistical analysis of net asset value and excess return for 16 products. Performed return attribution, quarterly statistical analysis of all products' expense and income data. Updated and sent company PPTs and weekly reports based on the needs of 79 investors, and answered product-relevant questions from them
 - Completed other operational tasks such as checking return swap data, performing information disclosure required by regulations, and creating shared documents to improve team efficiency
 - Interned from February 2022 to June 2022 and got return offer due to outstanding performance

INTERNSHIP EXPERIENCE

- Huatai Securities Asset Management (Shanghai), Shanghai / Project Intern** 2021.06-2021.08
- Supported client coverage of REITs, including interpreting new policies, writing promotional materials, summary reports and other documents
 - Performed REITs execution tasks, including preparing project application materials based on the format provided by the National Development and Reform Commission, processing project related licences and certificates, organizing project documents, calculating cash flow, and coordinating for due diligence work
 - Conducted daily work such as statistical analysis for C-REITs products
- Haitong Securities, Shenzhen, Guangdong / Research Assistant** 2020.06-2020.09
- Joined a top-ranking team in New Fortune Analyst Ranking and completed part of Interim Quarterly Report
 - Conducted in-depth industry analysis on educational industry and completed 12 pages of research report independently
 - Collected and prepared material for 10 programs covering industries of Education, Human Resources and Tourism, etc.

EXTRA-CURRICULAR ACTIVITIES

- Uniqlo, Shenzhen, Guangdong / Partner (PN) Intern** 2019.12-2020.01
- Took charge of cashiering and accounting, product packing, introduction, and promotion. Helped meet daily KPI
- Chinese Culture Communication Association, HKU, Hong Kong / Financial Director** 2018.10-2019.10
- Assumed responsibility of finance/asset management, new member recruitment, and team activity coordination
 - As Person in Charge (PIC) of Chinese Cultural Festival, organized a week-long event on HKU campus
- Missing Maps Mapathon Volunteer Activities, Hong Kong / Team Leader** 2019.10
- Led the team of 6 members in successfully labeling positions of building and facilities in fragmentary maps
- Deep Dive Rowing Camp (Founded by Former Asian Rowing Federation Chair), Shanghai / Team Leader** 2016.07
- Graded A+ for both rowing and leadership courses. Led the team of 4 members to win the first prize of the rowing contest

SKILLS AND INTERESTS

- **Language:** Chinese/Mandarin (Native), English (Fluent. TOEFL: 106; GRE: 324), Cantonese (Elementary)
- **Qualifications:** AMAC Fund Practitioner Qualification, SAC Securities Practitioner Qualification (Pass Exams)
- **Computer Skills:** R, SQL, Python, C/C++, Office (e.g., Excel, PPT, Word), Wind
- **Personal Interests:** Food and Nutrition, Rowing, Swimming, Ball Games, Live Action Role Playing, Music

刘卓珺

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教育背景

- 香港大学商学院, 香港 / 商业分析硕士 2023.08-2024.07 (预期)
- 香港大学, 香港 / 决策分析(统计、数学、计算机跨学科专业)和金融双主修专业学士 2018.09-2022.06
- 荣誉/成果: 香港大学全球本科生交换奖学金, 新生导师, 学生大使, 高阶项目录取
- 加州大学伯克利分校, 美国加州伯克利 / 香港大学交换项目交换生 2019.06-2019.08
- 荣誉/成果: 学习统计和数学相关课程, 转学分课程获 A+ 成绩
- 上海中学, 上海 / 高中生 2015.09-2018.06
- 荣誉/成果: 高考成绩 TOP 1%, 连年各项学科类省级竞赛奖, AMC12 TOP 5%

工作经历

- 上海众量私募基金管理有限公司, 广东深圳 / 基金运营专员 2022.02-2023.08
- 在业界知名合伙人领导下, 从事量化私募基金的投前、投中、投后市场及运营工作
 - 投前工作包含完成了托管方, 经纪商, 券商(中金财富、中信证券等)、期货公司(国泰君安期货等)、银行(招商银行、平安银行)自营、资管 FOF、代销等 41 个资金方的书面尽调报告, 并独立完成对其中 4 个资金方的路演
 - 投中工作主要为产品发行全流程, 包含确定产品要素, 签署三方协议, 产品备案, 交易账户开户, 协助投资人申购录单及资金转账等。独立跟踪发行 6 个产品, 与同事累计新增管理规模约 30 亿元。此外, 全程参与产品网下打新
 - 投后管理工作对内包含对 16 个产品净值及超额数据统计, 进行业绩归因, 每季度对所有产品费用及收入数据进行统计, 对外包含根据维护的 79 位投资人的需求更新并发送公司 PPT、周报, 回答投资人产品相关疑问等
 - 完成其他运营工作事项, 如核对收益互换数据, 执行监管要求的信息披露, 制作共享文档以提高团队效率等
 - 2022 年 2 月至 2022 年 6 月为实习期, 实习结束后因表现优异转正为正式员工

实习经历

- 华泰证券资产管理(上海)有限公司, 上海 / 项目实习生 2021.06-2021.08
- 参与 REITs 辅助承揽工作, 包括新政解读、推介材料、总结报告等文件的撰写、PPT 制作
 - 执行 REITs 承做工作, 包括根据发改委提供的格式文本协助准备项目申报材料, 办理项目相关证照, 参与尽职调查中项目基础文件整理、现金流测算、协调等工作
 - 类 REITs 产品数据统计等日常工作
- 海通证券股份有限公司, 广东深圳 / 研究所研究助理 2020.06-2020.09
- 加入新财富最佳分析师榜单排名前列的团队, 参与教育、旅游等行业 10 个项目的资料筹备工作和部分中季报告撰写工作
 - 通过参考过往报告内容角度、格式和研读公司会议纪要, 援引 wind、年度报告、招股书等多种数据来源, 独立完成 12 页教育行业某企业研究报告

社团及课外活动

- 优衣库(迅销), 广东深圳 / 初级伙伴 2019.12-2020.01
- 收银结账, 商品整理、导购与推介, 参与晨会晚会与店长沟通交流前日销量最高产品及每日 KPI, 帮助实现每日 KPI
- 香港大学中华文化交流协会, 香港 / 财务总监 2018.10-2019.10
- 日常职责: 财务/资产管理, 赞助申请, 采购, 招新及社团活动协调
 - 作为主要负责人, 组织策划并实施为期一周的华夏文化节活动, 及时调整活动策略以适应各种变化并取得更好的活动效果
- Mapathon 志愿活动, 香港 / 小组负责人 2019.10
- 参与无国界医生组织的 Mapathon 志愿活动, 负责带领 6 人小组根据卫星图片, 在缺失的地图中标记建筑及设施位置
- 深潜夏令营(由前亚洲赛艇联合会主席创办), 上海 / 主要营员, 小组组长 2016.07
- 参与赛艇训练, 参加领导力培训课程, 赛艇和领导力课程均获 A+(全营最高分), 带领 4 人团队获得 200 米赛艇计时赛第一名

技能与特长

- 语言能力: 英文(熟练掌握, TOEFL: 106; GRE: 324), 中文/普通话(母语), 粤语(基础)
- 资质证书: AMAC 基金从业资格, 通过 SAC 证券从业资格考试
- 计算机能力: R, SQL, Python, C/C++, Office (eg. Excel, PPT, Word), Wind
- 兴趣爱好: 食品与营养, 赛艇, 游泳, 球类运动, 剧本杀, 音乐