

# Kai Yang

## EDUCATION

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### Deakin University

2017-2020, Melbourne Australia

- Bachelor of Commerce – Bcom

Business Analytics; Management; Accounting for Decision Making; Marketing Fundamentals; Fundamentals of Finance; Personal Insight; Money and capital; Business finance; International finance and investment; Equities and investment Analysis; ethics for financial professionals; Analytical methods in economics and finance; Corporate finance; Derivative and fixed income securities.

### University of Adelaide

2021-31/12/2022, Adelaide Australia

- **Master of Applied Finance.**

Accounting Concepts & Methods, Economic Principles, Principles of Finance, Quantitative Methods, Fixed income Securities, Ethical Principles of Finance & Accounting, Equity Valuation & Analysis, Financial Statement Analysis, Derivatives, Advanced Corporate Finance, Advanced Funds Management.

## SKILLS

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- Good communications skills
- Excellent Decision-making skills
- Financial modelling
- Stock price evaluation
- Excellent Technical skills
- Good data gathering ability
- Excellent teamwork skills
- Proficient in the use of Microsoft Office software

## Job & Project EXPERIENCE

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### Fundingpips

Jan 2024 - Present

Determine the overall trend of the global economy through fundamental analysis (CPI, PPI, FMOC) and various economic data. Use Barchart to collect position data from global central banks and major financial institutions and analyze COT DATA to establish the overall derivatives market trend. Open positions through technical analysis of the price trends of major pairs such as DXY/EUR/USD/GBP/AUD/GOLD.

### TOPSETP

NOV 2023 – Present

Determine the overall trend of the global economy through fundamental analysis (CPI, PPI, FMOC) and various economic data. Use Barchart to collect position data from global central banks and major financial institutions and analyze COT DATA to establish the overall derivatives market trend. Build positions through technical analysis of NQ/ES/YM/ and crude Oil price trends, and obtain risk-free returns through hedging.

### FUJIA Academy (Hedge Fund) , Financial Analyst / Trader

Sydney May 2023 – August 2023

- Support the financial team in daily analysis.
- Market research and analysis covering macro and micro trends, and opportunity prioritization.
- Data collection and analysis aimed at technical analysis and fundamental analysis.
- Assist the trading team in the review, integration and deployment of new and existing technology tools to further automate trading processes.
- Maintenance and review of proprietary trading systems reports.

**TMGM**

Adelaide, Australia

**Account manager Intern**

August 2022- October 2022

- Opened account for clients.
- Introduced new securities to potential investors.
- Prepared materials for clients to purchase securities.
- Improved operational efficiency by performing operational support for clients, such as opening accounts, preparing security purchasing materials, and answering FAQs

**Business Finance project**

Melbourne Australia

- Analyse the past performance of companies traded on the Australian Stock Exchange and calculate monthly and annual holding period returns for stocks and indices
- Calculate the correlation coefficient between data series using excel.
- Calculate the expected return per stock traded on the Australian Stock Exchange
- Prepare a cash flow statement and calculate the NPV and IRR for the proposed project.

**Group Business Finance project**

- Evaluating 4 companies for risk and return
- Develop optimal portfolios and reduce portfolio risk through teamwork.

**Derivatives and fixed income securities project**

Melbourne Australia

- Drawing Term Structure by excel based on data.
- Valuation of bonds through existing data.
- Calculate the mean and standard deviation of returns for each of the indexes.
- Calculating the risk of index derivatives on the ASX and present it to clients in general language.

**Equity Valuation & Analysis Group Project**

Aug. ~Nov. 2021, Adelaide Australia

- Valuation of stocks using discounted cash flow method
- Produce pro-forma financial statements and perform a DCF valuation using free cash flows to equity and the firm.
- Provide a recommendation to Buy/ Sell or Hold shares at the valuation date.
- Use trailing P/E or trailing P/N ratio to determine whether a stock is currently overvalued or undervalued.

**Financial Statement Analysis**

Aug. ~Nov. 2021, Adelaide Australia

- Explained the internal and external capital market relationship through a presentation, identified the incentive structure of the corporate headquarters, and explained how the internal capital market adds value.
- Explain the conflict between corporate headquarters and shareholders regarding the level of diversity.

**Derivatives project**

Mar. ~ July 2022, Adelaide Australia

- Decide to go long or short on a stock based on valuation.
- Create a synthetic stock portfolio using options and pure discount bonds and compare the performance of the synthetic portfolio with the stock itself.
- Use Greeks to hedge and evaluate the hedging effect.

**Advanced Funds Management**

Mar. ~ July 2022, Adelaide Australia

- Manage three types of funds: defensive balanced and growth.
- Calculating the weighted average management costs/indirect expenses ratio across all funds
- Detailed Bottom-up analysis of one Equity and one Bond fund selected for this Lifestyle fund.

**Additional Information**

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**Language**

- English
- Mandarin