Zhongyu (Joey)Wang

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EDUCATION BACKGROUND

University of Rochester, Simon Business School **Rochester, NY**
PhD in Finance Jul 2025 – Present

- Currently pursuing doctoral studies focusing on asset pricing and financial intermediation.

Washington University in St. Louis, Olin Business School **St. Louis, MO**
Master of Science in Finance-Wealth and Asset Management Sept 2022 – Dec 2023

- **Cumulative GPA:**3.98/4.0; **GRE:**330
- **Relevant Coursework:** Advanced Corporate Finance, Advanced Derivative Securities, VC Methods, M&A, Data Analysis for Investments, Stochastic Foundations for Finance, Database Design and SQL, Investment Praxis, Quantitative Risk Management, Options and Futures
- **Honors:** Member of the Beta Gamma Sigma; Outstanding Finance Student Award; the Charles F. Knight Scholar

Central University of Finance and Economics **Beijing, China**
Bachelor of Science in Fintech Sept 2018 – Jun 2022

- **Cumulative GPA:** 3.54 / 4.0
- **Relevant Coursework:** Econometrics, Big Data and Finance, Fixed-income Security, Behavioral Finance, Microeconomics, Macroeconomics, Corporate Finance, Data Structure and Algorithm, Computer Network, Data Mining
- **Honors:** Awarded Honorable Mention in the Interdisciplinary Contest in Modeling (2020), Winner of 11th Financial Investment Planning Competition (2020)

RESEARCH EXPERIENCE

Washington University in St. Louis, Olin Business School **St. Louis, MO**
Research Assistant Feb 12, 2024 – Jun 30, 2025

- Conduct empirical research on mortgage-backed and asset-backed securities (MBS/ABS), focusing on the impact of servicing fee mispricing, issuer-servicer mismatches, and regulatory distortions on loan performance and investor outcomes
- Built and cleaned large-scale datasets by merging loan-level and deal-level data from Bloomberg, CoreLogic, and internal databases using Python, R, and Stata
- Designed and executed panel regressions, event studies, and matching algorithms to identify agency conflicts and pricing anomalies in secondary markets
- Produced automated scripts for data validation, figure generation, and robustness checks; contributed directly to manuscript tables, appendices, and replication packages for working papers under review
- Collaborated with multiple RAs to coordinate data processing and research updates, maintaining documentation via institutional repositories

TEACHING ASSISTANT EXPERIENCE

Washington University in St. Louis, Olin Business School **St. Louis, MO**
Teaching Assistant Oct 6, 2023 – Feb 21, 2025

- Assisted in designing and delivering course content for undergraduate and graduate courses, such as Options and Futures, Investment Theory, Advanced Derivatives, Fixed Income and Advanced Corporate Finance
- Led tutorial sessions and weekly discussions, created and graded examinations, assignments, and projects, and provided detailed feedback to enhance student learning
- Held regular office hours to offer additional support, clarify course materials, discuss financial theories and their real-world applications, and collaborated with course instructors to ensure a cohesive educational experience

INTERNSHIP EXPERIENCE

China Galaxy Securities Co., Ltd **Beijing, China**
Intern in Investment Banking Department Feb 2022 – Jun 2022

- Reviewed key accounting item vouchers through ledger examinations and bank inquiries using a control sheet to track 122 responses; analyzed transactions for 2020 and 2021 to substantiate cash verification efforts.
- Performed due diligence using Wind database and annual reports, analyzed company history, assets, IP rights, client/supplier data, organized issuance standards and regulations of National Equities Exchange and Quotations, completing a 30-page report
- Evaluated client products and business models, conducted horizontal financial comparisons over time, and assessed profitability, solvency, and operational capabilities; drafted fundraising prospectus sections for private placement, coordinated with quality control for document adjustments and fact-checking to ensure accuracy

Deloitte **Beijing, China**
Intern Analyst in Risk Advisory Department Sept 2021 – Dec 2021
- Initiated an investigation on bond market, focusing on Chinese bond defaults, financing characteristics, risk management approaches; employed empirical research of corporate default probability, leading to a refined approach in bond default factor identification and Risk Warning Model construction
- Leveraged Wind database and internal data to increase securities firm's rating system through Python-based analysis, including time-series validation, rating methodologies optimization, and empirical testing, increasing predictive accuracy and stability for credit risk assessment across diverse market segments

V Fund Management Co., Ltd **Beijing, China**
Intern in Investment Department Jan 2021 – Feb 2021
- Communicated with C-suite executives and finance departments to organize and collect financial data; collaborated with investment managers in interviews with experts, and analyzed industry trends and sustainability of enterprises' growth
- Performed equity valuation for target companies and potential investment opportunities using Discounted Cash Flow, Comparables, and Precedent Transactions methods; integrated business model analysis, market landscape, industry forecasts, and competitive advantages in drafting investment memos and reports

PROJECT EXPERIENCE

CFAR (Center for Finance and Accounting Research) Consulting Project Sept 2023
- Developed an optimized ETF for a local investment firm using VBA, investigated short-term market reversal phenomena by developing 12 Python scripts to process 36.7GB of data, and acted as the bridge between programming and theoretical research teams to facilitate client requirement understanding, producing a 46-page slide deck with 118 charts
- Received the First Place Achievement in Quant certificate at the 2023 Practicum Showcase

Quantitative Stock Selection Research Jun 2022
- Labeled stock trading data with indicators derived from moving averages across different timeframes and created predictive models for stock trading using machine learning techniques, including Random Forest, k-nearest Neighbors, and Gradient Boosting Decision Tree methods, to identify optimal buying and selling points
- Executed thorough model fitting analyses, ensuring precision and effectiveness of predictive algorithms in stock market applications, effectively identifying market downturn trends and generating a 5.92% excess return

Research on Convertible Bond Trading Strategy Based on Media Text Emotion Nov. 2020
- Collected data on convertible bonds from the Wind database and constructed sentiment indicators using a news database through text analysis
- Developed and implemented an NLP-driven trading strategy based on sentiment indicators, utilizing Python to execute a delta hedging and arbitrage strategy
- Conducted model back-testing, confirming its high accuracy and a substantial positive rate of return

PROFESSIONAL SKILLS

Technical Skills: Proficient in Excel, VBA, Python, C++, Stata, SPSS, SQL, S&P Capital IQ, WRDS, Pitchbook, Bloomberg, Wind
Certificates: Passed CFA Level 1, CFA Level 2 Candidate
Languages: Mandarin Chinese (Native), English (Professional)

ACTIVITIES & INTERESTS

Activities: Touching Nature Choir Member, Guitarist and Vocalist, 25-meter Standard Pistol Athlete, Volunteer
Interests: Singing, Music, Travel, Film, Reading