

# Annie Zheng

## EDUCATION

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### Rotman School of Management & Department of Economics, University of Toronto

Toronto, Ontario

*Master of Financial Economics*

*Expected June 2025*

- **Award:** Graduate Entrance Scholarship (\$8,000)
- **Relevant Courses:** Corporate Financing II, Financial Economics, Econometrics, Options and Futures

### Rotman School of Management, University of Toronto

Toronto, Ontario

*Bachelor of Commerce (Specialist in Finance and Economics)*

*2019 – 2023*

- **Academics:** cGPA 3.86/4.00
- **Awards:** Graduated with Distinction; Dean's List: 2019 - 2023
- **Relevant Courses:** Corporate Finance (A+); Fixed Income Securities (A+); Futures & Options (A); Private Equity (A)

## INDUSTRY CERTIFICATIONS

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- Passed CFA Level I *2022*
- The Marquee Group (Accounting, Valuation: DCF, Merger Modeling) *2023*
- CFI (Accounting Fundamentals, Financial Analysis Fundamentals, Valuation Modeling, Fixed Income Fundamentals) *2021*
- SAS Programming Certification *2022*

## PROFESSIONAL EXPERIENCE

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### Ontario Teachers' Pension Plan

Toronto, Ontario

Investment Intern - Credit, Capital Markets

*Summer 2024*

- Identified daily equity exposures exceeding \$500K for convertible bonds to uphold an equity-neutral investments strategy
- Pitched Main and IG compression trade idea, utilizing a relative value strategy and scenario analysis to effectively manage tail risk
- Developed an automated, scalable credit document intelligence solution using Azure OpenAI and Python
- Assisted backtesting on CLO emulation across 6 managers to develop and refine new investments strategies using Intex and Python

### Peak Power

Toronto, Ontario

Markets Analyst – Corporate Development

*Winter 2023*

- Co-authored California Energy Incentive Guide for distribution to platforms on Google, LinkedIn and Peak Power website
- Quantified and organized performance metrics across 6 departments in due diligence for a \$20M USD series A fundraising round
- Collected data of 68 battery storage competitors and identify top threats to Peak Power from secondary research

### Deloitte

Beijing, China

Consulting Part-Time Assistant

*Summer 2021*

- Researched external conditions of the client Beiran Ltd. for the development into the EV business
- Collected data on industry development and environment, market demand and supply chain
- Explored potential trends and the shifting focuses of the future EV industry given China's subsidy reform

## EXTRACURRICULAR ACTIVITIES

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### Ontario Teachers' Pension Plan Capital Markets Women's Network

Toronto, Ontario

Secretary Assistant

*Summer 2024*

- Documented meeting notes, ensuring accurate and comprehensive records of discussions and decisions
- Contributed to event planning by collaborating on logistics, speaker coordination, and overall event strategy
- Organized a networking event for 50+ attendees, including Chief Investment Officers (CIOs), managing food planning and budgeting

### Private Equity Case Presentation

Toronto, Ontario

Team Lead

*Fall 2023*

- Performed valuation analysis using an LBO model, developing three distinct scenarios to assess potential outcomes
- Identified and analyzed potential risks associated with each scenario, proposing effective mitigation strategies
- Selected as a finalist to present among 2 analysts from Clairvest Group and approximately 40 students

## PERSONAL

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- **Technical skills:** Familiar with Excel, Capital IQ, FactSet, Stata, Intex and Python
- **Languages:** Fluent in Mandarin and English
- **Interests:** Basketball (Intramural Team at UofT), Poker, Member of WCM, Podcasts: Goldman Sachs Exchanges, Loonie Hours