

Annie Zheng

EDUCATION

Rotman School of Management & Department of Economics, University of Toronto Toronto, Ontario
Master of Financial Economics 2023 – 2024

- **Awards:** Graduate Entrance Scholarship (\$8,000)
- **Forthcoming Relevant Courses:** Corporate Financing II, Financial Economics, Econometrics

Rotman School of Management, University of Toronto Toronto, Ontario
Bachelor of Commerce (Specialist in Finance and Economics) 2019 – 2023

- **Academics:** cGPA 3.9/4.0
- **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

- Passed CFA Level I 2022
- CFI (Accounting Fundamentals, Financial Analysis Fundamentals, Valuation Modeling) 2023
- SAS Programming Certification 2021

PROFESSIONAL EXPERIENCE

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

ETC Investment Group Toronto, Ontario
External Relationship Representative 2021 - 2023

- Collected \$5888 CAD in sponsor fees to support club events
- Reached out to professionals for events such as Wealth Management case competitions, and business pitches through networking
- Published research on crude oil pricing and energy shortage by analyzing the drivers, the macro and micro implications

Private Equity Case Presentation Toronto, Ontario
Team Lead Fall 2023

- Conducted valuation analysis using LBO model with three scenarios
- Identified potential risks and mitigations linked to the scenarios
- Selected as the finalist to present among 2 analysts from Clairvest group and ~40 students

Rotman Commerce Consult for impact Toronto, Ontario
Junior Analyst Summer 2021

- Created a business strategy sustainable plan for Community Futures Huron for the reuse of a historic mill property in Canada
- Planned out crowdfunding ideas that contributed to \$135,000 CAD funding goal
- Identified the target market and sweet spot for heritage sites with marketing strategies and local partnership ideas

PERSONAL

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