

Jimmy Yuan

EDUCATION

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

Master of Financial Economics

– **Relevant Courses:** Corporate Financing II (MBA), Financial Economics, Macroeconomics

Toronto, Ontario

July 2023 – Dec 2024

Desautels Faculty of Management, McGill University

Bachelor of Commerce (Major in Finance with a Concentration in Business Analytics)

– **Academics:** cGPA 3.70/4.0

– **Award:** Dean's Honour List

– **Relevant Courses:** International Finance (A); Advanced Business Statistics (A); Mergers and Corporate Reorganizations (A-);

Montreal, Quebec

Sep 2019 – Dec 2022

INDUSTRY CERTIFICATIONS

– Corporate Finance Institute (CFI): Valuation Modeling, Financial Statements Analysis

2023

– Bloomberg Market Concepts (BMC) Certificate

2022

PROFESSIONAL EXPERIENCE

Fidelity Investments

Financial Analyst Intern, Decision Support Team

– Investigated ESG implementation strategies and formulated 5 transition trends, which were referenced in ESG report

– Supported competitive strategy development for product launches through flow and composition analysis of Canadian mutual funds

– Performed daily asset reporting procedures and streamlined Macro process, resulting in one-hour daily efficiency improvement

Toronto, Ontario

Summer 2022

Morgan Stanley

Investment Banking Internship, China Equity Team

– Assisted senior bankers on the business due diligence process of the Chinese A-share equity raise/issuance and HK IPO deals

– Gathered and updated industry and company specifics to perform in-depth research on Chinese New Energy and EV market

– Prepared investment memos and financial models & valuation charts for key stakeholders pitches

– Analyzed target company financials and performed EBITDA adjustments to standardize peer comparison results

Shanghai, China

Fall 2021

Notable Projects:

Project Starlight (Top EV Drive System Manufacturers) Private Round Financing (~\$100mm Deal Size)

○ Conducted industry research, sections include: growth drivers, value chain analysis, competition landscape, regulations

○ Participated in the management interviews and validated the key suppliers' transactions through 1-week onsite scrutiny

○ Drafted 52-pages pitchbook for client meetings, contents include: bank records, deal advantages and industry insights

Project Fire (Leading Self-driving Computing Chip Designer) STAR IPO

○ Addressed regulatory concerns on competitive landscape by referring to the company's 5-year market share growth

○ Developed DCF model based on 5-year 3-statements projection and used multiple method for terminal value calculation

Meridian Capital China

Venture Capital Summer Analyst, Consumer Sector Coverage

– Drafted investment reports of 10 start-ups in overseas e-commerce, food franchises, media and corporate services

– Prepared due diligence question lists and drew up investment theses through utilization of market data and competitive analysis

– Led 15 target company's suppliers, franchisee and clients interviews to analyze channel, brand power and pricing details

– Completed 5 DCF & Comp Models to analyze MOIC/IRR (avg ~\$10mm investments), used as reference for IC decision making

Shanghai, China

Summer 2021

EXTRACURRICULAR ACTIVITIES

McGill Bankers International Association

Vice President, External Affairs

– Organized 6 club seminars (50+ attendees), topics included TAM calculation, valuation approaches for TMT/Consumers companies

– Directed club stock pitch competition and offered feedback to 6 groups representing different industries

Montreal, Quebec

Fall 2021-Winter 2022

Huawei Connect 2020 Industry Event

Volunteer Group Leader

– Developed group workflow process for 20 volunteers, resulted in 6-page training manual and led the team-building session

– Provided route guidance and emergency materials for 200+ attendees, enhanced attendee experiences and communication techniques

Shanghai, China

Fall 2020

PERSONAL

– **Technical Skills:** Excel, Bloomberg, Capital IQ, MorningStar, Factset; Python, Java, R

– **Languages:** Fluent in English and Mandarin

– **Interests:** Texas hold'em, Camping, Soccer, Podcasts, Go Game (Chinese Strategy Board Game), Travelling (20+ Countries)