Alicia Kong

EDUCATION

Rotman School of Management & Department of Economics, University of Toronto Toronto, Canada
Master of Financial Economics *Expected June 2026*
- **Awards:** Graduate Entrance Scholarship ($8,000)
- **Relevant Courses:** Financial Economics, Corporate Finance II, Security & Portfolio Analysis

Rotman School of Management, University of Toronto Toronto, Canada
Bachelor of Commerce (Specialization in Finance and Economics, Focus on Data Science) Sep 2020 – Jun 2024
- **Academics:** cGPA 3.84/4.0
- **Awards:** In-Course Academic Scholarship ($1,500); Entrance Scholarship ($7,500); Graduated with Distinction; Dean's List 2021-2023
- **Relevant Courses:** Corporate Finance (A); Capital Markets (A+); Investments (A+); Financial Statement Analysis (A+); Fixed Income Securities (A+); Derivatives (A+); Financial Risk Management (A+); Macroeconomics (A+); Econometrics (A)

INDUSTRY CERTIFICATIONS

- Passed CFA Level I & II *2024*
- Bloomberg Market Concepts (BMC): Equities, Terminal Basics, Portfolio Management, Economic Indicators *2024*
- Corporate Finance Institute (CFI): Financial Analysis, Corporate Finance, Accounting, Fixed Income *2024*

PROFESSIONAL EXPERIENCE

BMO Financial Group Toronto, Canada
Intern – Lending Analyst *May 2023 – Aug 2023*
- Utilized Excel VBA macro to automate the existing manual data collection process, improved daily work productivity by 40 minutes
- Performed data cleaning procedures via Excel, enhanced data integrity and model readability by 30%
- Generated variance analysis between property tax bills and payment disbursements to optimize daily operation efficiency
- Worked alongside manager and prepared monthly payment reports, consistently achieving 100% accuracy in data reconciliation

Pacific Century Securities New York, US
Intern – Investment *May 2022 – Aug 2022*
- Conducted industry research and fundamental analysis leveraging Capital IQ and Bloomberg Terminal to support analysts' equity research reports
- Collaborated with valuation team in building financial models (DCF) and valuation tables based on three-statement analysis for tech industry client
- Organized, cleaned, and filtered financial datasets via Excel, ensuring accuracy and integrity in client data management process

Ping An Bank Nanjing, China
Intern – Risk Analyst *May 2021 – Aug 2021*
- Performed data-mining process using Excel and SQL to identify meaningful data patterns and extract useful information
- Implemented credit analysis models to examine, analyze, and evaluate clients' financial capacity and repayment ability
- Conducted risk evaluation on more than 200 loan applicants to determine individuals' risk tolerance levels and facilitate credit approval process
- Leveraged PowerPoint and Tableau to present actionable insights and further support managerial decision-making through data analysis

RELEVANT ACADEMIC PROJECTS

Capital Markets Portfolio Management Project (Grade: A+) *Jan 2023 – Apr 2023*
- Implemented portfolio optimization strategies resulting in a 20% holding period return, securing 1st among peers during the 4-month trading period
- Conducted rigorous risk assessments (Monte Carlo Simulation & VaR model) to implement proactive risk mitigation strategies
- Optimized portfolio allocation by rebalancing on a biweekly basis to enhance operational efficiency and foster capital growth

Corporate Development M&A Financial Analysis Project (Grade: A) *Jan 2022 – Apr 2022*
- Led a team of 3 students to deliver VF Corporation's capital market financial analysis utilizing Capital IQ and Bloomberg Terminal
- Compiled industry and financial analysis to evaluate the firm's industry trends, market size, revenue forecast, future cashflows, and potential risks
- Performed DCF and comparable company analysis on VF Corporation and recommended M&A strategy for shareholder value creation

EXTRACURRICULAR ACTIVITIES

J.P. Morgan Private Bank Challenge Toronto, Canada
Finalist & Team Captain *Mar 2022 – Apr 2022*
- Collaborated with 4 students to design a long-term investment portfolio tailored to client objectives, risk tolerance, and macroeconomic outlooks

PERSONAL

- **Technical skills**: Excel (v-lookup, pivot table), PowerPoint, Capital IQ, FactSet, Bloomberg Terminal, Python, Stata, SQL, Tableau
- **Memberships**: VersaFi (formerly Women in Capital Markets), Women in ETFs
- **Languages**: Fluent in English and Mandarin
- **Interests**: Coffee Enthusiast (certified barista), Photography (35mm film), Jazz Music, Bodybuilding & Weightlifting, Podcasts