

Amberly (Sihan) Zhou

EDUCATION

Rotman School of Management & Department of Economics, University of Toronto Toronto, Ontario
Master of Financial Economics Expected June 2026

- **Award:** Graduate Entrance Scholarship (\$6,000)
- **Relevant Courses:** Corporate Financing II (MBA), Options and Futures (MBA), Financial Economics (MA)

Ivey Business School, Western University London, Ontario
Bachelor of Arts, Honours Business Administration (HBA) Sep 2020 – Apr 2024

- **Academics:** cGPA 3.4/4.0
- **Awards/Scholarships:** Dean's List (2020-2022), Western Scholars (2020-2022), Western Admission Scholarship (2020)
- **Relevant Courses:** Private Equity, Derivatives and Financial Markets, Managerial Accounting, Global Macroeconomics for Managers International Economics, Business Law

INDUSTRY CERTIFICATIONS

- Corporate Finance Institute – Financial Modelling & Valuation Analyst (FMVA) 2024
- JPMorgan Software Engineering Virtual Experience (Program) 2023
- Bloomberg ESG (Environmental Social Governance) Certificate 2022
- Bloomberg Market Concepts Certificate 2022
- FRM Level I 2021

PROFESSIONAL EXPERIENCE

China Merchants Securities Nanjing, China
Financial Analyst – Investment Banking Division May – Dec 2021

- Executed commercial, financial, and tax due diligence, formulated effective risk management plans, culminating in successful M&A deals from opening to closing with the audit committee and external legal firm

Notable Project:

- CA\$30M M&A Deal from the Sell-side in the Internet of Things (IoT) industry
 - Crafted a 15-page smart home devices research report highlighting investment opportunities, catalysts, and risks
 - Led sell-side analyst morning calls, leveraged equity reports to analyze IoT industry outlook and policy impact
 - Drafted pitchbook and a tiered approach for acquiring to reduce downside risk, initiated outreach of 25 leads/week

Founder Securities Shenyang, China
Summer Analyst – Equity Capital Markets (ECM) Division May – Jul 2020

- Coordinated with legal and compliance teams to monitor filings, managed investor lists, supported capital-raising activities
- Utilized Wind Terminals and CapIQ to retrieve relevant market data for valuation modelling
- Summarized and presented financial reports, industry publications, and news articles to the ECM team about market movements.
- Recalibrated post-IPO portfolios and monitored market sentiment (P/E, PEG) in the aftermarket to reduce stock volatility

Vdream Educational Company Xi'an, China
Manager of Operation and Public Relations Departments May 2019 – Aug 2020

- Strategized workflow by initiating trendy campaigns to amplify brand exposure and profitability, tripled the net profit to \$2,000/month
- Orchestrated a press conference to present financials and highlight company commitment, effectively managing the PR crisis

EXTRACURRICULAR ACTIVITIES

Morgan Stanley New York, New York
Assistant Analyst – Consumer & Retail Group Jun – Nov 2023

- Worked alongside the program director, crafted a 17-page screening memo and 28-page investment memo for the internal committee
- Updated DCF, Trading Comps and Transaction Comps for the Electronics Vehicles and Coffee industries
- Conducted analysis of 3 CIMs, evaluating seller-specific and systematic conditions, bolstered investment decisions

BCG Case Project London, Ontario
Analyst & Elevator Pitch nominee Sep – Nov 2022

- Researched and analyzed financial and operational aspects for three companies spanning retail, political, and non-profit sectors
- Conducted analysis on DCF/comps valuation using Bloomberg Terminals and Excel
- Crafted reports for companies' financial performance projections and presented solutions for the live business challenge

PERSONAL

- **Technical skills:** Excel, Access, Powerpoint, Bloomberg Terminal Services, Capital IQ, R Studio, XML, SQL, Python (Beginner)
- **Languages:** Mandarin (Fluent), English (Fluent), Japanese (Classroom learning)
- **Interests:** Golfing, Skiing, Horseback riding