

# Emma Zhang

## EDUCATION

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

*Master of Financial Economics*

Toronto, Ontario

*Expected June 2027*

- **Upcoming Relevant Courses:** Corporate Financing II (MBA), Financial Economics (MA), Security & Portfolio Analysis (MBA)

### Ivey Business School, Western University

*Bachelor of Arts, Honours Business Administration (HBA)*

London, Ontario

*Sep 2021 – Jun 2025*

- **Academics:** cGPA 3.8/4.0
- **Awards/Scholarships:** Dean's List, Western Admission Scholarship of Distinction (\$2,500)
- **Relevant Courses:** Finance (A), Managerial Accounting (A), Macro Financial Analysis (A), Math for Financial Analysis (A+), Statistics (A+), Sustainable Finance (A), Mathematical Economics (A+), Financial Analytics (A)

## INDUSTRY CERTIFICATIONS

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- Corporate Finance Institute (CFI) – Corporate Finance Fundamentals, Valuation Modeling, Financial Analysis Fundamentals 2025
- Passed CFA Level I 2024
- Bloomberg Market Concepts (BMC) – Economic Indicators, Currencies, Fixed Income, Equities 2023

## PROFESSIONAL EXPERIENCE

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### Good News Ventures

*Venture Capital Summer Analyst*

Toronto, Ontario

*May 2024 – Aug 2024*

- Sourced B2B and B2B2C investment opportunities in blockchain and AI/ML through 20+ founder calls
- Drafted three investment memos to evaluate companies' market positioning, financials, and strategic fit with investment theses
- Categorized and analyzed investor types across the cap tables of 30+ portfolio companies to support ownership tracking
- Addressed portfolio companies' post-investment requests in business expansion and investor outreach

### Lang School of Business and Economics, University of Guelph

*Undergraduate Research Assistant – Crypto Carry Trades and Equity Risk Premium*

Guelph, Ontario

*May 2024 – Sep 2024*

- Worked under Professor Zhenzhen Fan and used Python to conduct OLS regression analysis on the US equity market, identifying correlations between earnings surprises and factors including earnings changes, long-term growth revisions, etc.
- Built long/short cryptocurrency portfolios in Python by grouping assets into terciles on excess returns over US T-bills
- Extracted and managed data from over 30 macro market indices via Bloomberg, contributing to the empirical asset pricing research

### A2Z Capital Inc.

*Asset Management Summer Analyst*

Vancouver, British Columbia

*Jul 2023 – Sep 2023*

- Analyzed Metro Vancouver's industrial real estate market, highlighting key industry characteristics and emerging trends
- Evaluated project risks by reviewing cost factors and macroeconomic conditions, using scenario analysis to enhance decision-making
- Assisted senior analysts in stakeholder communications; received a \$2,000 scholarship for top overall performance

### Shenzhen Capital Group Co., Ltd

*Venture Capital Summer Analyst*

Shenzhen, Guangdong, China

*May 2023 – Jul 2023*

- Researched the indoor positioning system industry, analyzing 10+ pivotal players and seven types of positioning technology
- Supported a Series A due diligence, including management interviews, unit economics analysis, and product-market fit assessment
- Used Excel to model valuation through market comps and return targets based on investment risks and macro market conditions

## NOTABLE PROJECTS & EXTRACURRICULAR ACTIVITIES

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### Notable Projects

#### Portfolio Optimization (Grade: A+)

- Used Excel to build a minimum-variance portfolio of 10 publicly traded stocks over five years, using share prices, S&P 500 index data, and US T-bill rates to analyze risk-adjusted returns and diversification benefits
- Visualized the efficient frontier using Excel and identified the optimal portfolio weightings with the highest Sharpe ratio

#### StockTrak Trading Simulation (Rank: 2/50)

- Built a diversified equity portfolio across healthcare, technology, and real estate, reaching a Sharpe ratio of 2.17 over four months

### Investa Insights

*Investment Analyst*

London, Ontario

*Oct 2024 – Apr 2025*

- Collaborated with a team to perform macroeconomic and fundamental analysis on public equities across Industrials and CPG sectors
- Delivered investment recommendations through LBO and stock pitches with detailed bear/bull cases for valuations

## PERSONAL

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- **Technical skills:** Familiar with Excel, Bloomberg Terminal, Capital IQ, PitchBook, FactSet; Python, R, SQL, Tableau, Power BI
- **Languages:** English, Mandarin
- **Interests:** Karaoke singing, Recreational badminton, Member of VersaFi, Podcasts: Wall Street Breakfast, Goldman Sachs Exchanges