Ming Xuan (Chellvyn) Lai

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EDUCATION

THE UNIVERSITY OF IOWA
Master of Science, Finance – STEM-Designated | GPA: 3.8/4.0   Anticipated December 2023
Bachelor of Business Administration, Finance | Certificate in Risk Management, and Insurance   May 2022

Henry Fund: Equity Research Analyst | Health Care   January 2023 – Present
- Selected through a competitive application process to oversee a $20 million student-managed equity portfolio.
- Responsible for building robust financial models and completing industry and companies research for the HealthCare sector, comprising over 15% of the portfolio. Utilized the DCF, economic profit, relative valuation, and DDM models.

INTERNSHIP EXPERIENCES

BLUE CROSS BLUE SHIELD WELLMARK, INC, Des Moines, IA
   Segment Performance, Market Insights, Competitive Intelligence Intern   May 2023 – Present
- Conduct in-depth competitor profiling and analyze industry trends to identify strategies and future growth opportunities.
- Collaborate cross-functionally to provide competitive intelligence for product development, marketing & sales initiatives.

UNITED OVERSEAS BANK, Kuala Lumpur, MY
   Global Market & Treasury Intern   June 2022 – August 2022
- Rotational program within the Asset Liquidity Management, Rates, Forex Trading, and Sales departments.
- Assisted in preparing FX market research reports using fundamental and technical analysis to support trading decisions.

AEGON ASSET MANAGEMENT, Cedar Rapids, IA
   Portfolio Management Intern   May 2021 – May 2022
- Optimized 15 years' worth of financial market data and efficiently aided in data-driven portfolio allocation decisions.
- Mentored junior interns, facilitated progress, imparted essential financial knowledge, and improved performance.
- Developed Excel macros using VBA to automate data mining, streamlining the process, and increasing efficiency.

ACTIVITIES

MFIN Graduate Student Ambassador   January 2023 – Present
Teaching Assistant | Introduction to Risk Management & Enterprise Risk Management   August 2022 – Present

Quantitative Finance Club Founding Member   January 2023 – Present
- Founded an interdisciplinary club and recruited members from undergraduate and graduate departments.
- Experimented with geometric Brownian motion and Black Scholes simulation in Python to compute option pricing.

Venture Capital Investment Competition   February 2023
- Competed in a team of 5 to analyze 3 pitch decks, conduct business research, host due diligence, and negotiate investment terms with entrepreneurs. Gained valuable experience in deal sourcing and structuring a VC term sheet.

SKILLS

Technical: Excel, Word, PowerPoint, Access, VBA, SQL, Tableau, Power BI, Certificates in Python for Analytics

Financial Software: Aladdin Blackrock, Bloomberg, Barclays, FactSet, Thomson Reuters Eikon, NetAdvantage, MorningStar
Languages: (native) English, Chinese, Cantonese (intermediate) Korean, Malay
US Work Authorization: 36-month Optional Practice Training Extension