

Xiaoyu Zhu

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Summary

Transitioning from a career in the investment industry and seeking a full-time role in business analytics; already equipped with data analytics capabilities with an analytical and data-obsessed mindset, a degree in statistics, familiar with SQL, R programming and Tableau

Skills

- Analytics: spreadsheets, SQL, Tableau, R
- Business: Agile project management, data-driven problem solving
- Investment: portfolio analytics, asset allocation, economic research, fund analysis

Experience

J.P. Morgan Asset Management, Shanghai, China *Senior Product Strategy Specialist*

NOVEMBER 2022 - AUGUST 2024

- Performed data analysis on market trends and product shelf review, to present recommendation to senior management on business strategy
- Produced competitive analyses to facilitate the offering and sales of proprietary mutual funds, directly resulted in 2 billion CNY of cash inflows into funds within a year
- Produced quarterly Focus Fund list to provide insights and guidance for sales team
- Owned the end-to-end organization of weekly morning call that is open to entire company, topics of which may include corporate strategy, mutual fund products update, competitive analysis, investment hot topics, or culture-related events

FIDELITY INSTITUTIONAL, Smithfield, RI, USA *Product Manager*

JULY 2020 - SEPTEMBER 2022

- Led a development team with 6 members to build portfolio construction and fund comparison tools, a web-based solution for portfolio diagnosis, which allows a methodical analysis of all elements of investors' portfolios, helping them to unlock overlooked exposure, value and reduce neglected risks
- Used data-driven decision making to prioritize among multiple projects
- Defined missions and visions, and designed user workflows for a digitized portfolio construction toolkit
- Established project goals, and refined road maps and timelines with business and technical leaders; reconciled the urgency and priority of business requirements and the realities of development processes
- Translated strategic objectives into development actions; prioritized development work, and managed dependencies with other squads
- Collaborated with procurement team and external vendors to secure data sources, in order to expand investment universe and analytical capabilities of the toolkit

- Presented achievements, and discussed impediments and planned work with all stakeholders and business partners involved in Portfolio Construction initiatives at bi-weekly sprint review sessions
- Coordinated with Marketing and Learning & Development teams on product launches and feature releases

FIDELITY INSTITUTIONAL, Smithfield, RI, USA *Senior Investment Analyst*

JANUARY 2016 - JULY 2020

- Designed and created Portfolio Quick Check, a portfolio diagnostic tool, which was used on 1,817 portfolios among 758 advisors within the first six months
- Improved and automated a suite of portfolio construction tools, with a \$7 billion attributable sales in the first year; owned the ongoing core and maintenance responsibility of the tools, and assisted Distribution team with training and troubleshooting
- Performed economic and market analyses on topics, and prepared presentations that help advisors understand the myths and realities of portfolio construction
- Provided independent solutions and recommendations on how to position and promote proprietary mutual funds and exchange-traded funds

FIDELITY INSTITUTIONAL, Smithfield, RI, USA *Investment Analyst*

SEPTEMBER 2013 - DECEMBER 2015

- Performed ad hoc analyses for Relationship Managers and Wholesalers in preparation for a client meeting or in response to a client inquiry
- Designed and implemented a database and scorecard that quantitatively identifies opportunities and alerts for proprietary funds in 30+ advisor platforms and research lists
- Repaired a stale process to produce quarterly fund review presentations by re-establishing connection between an internal Oracle database and a third-party software

Education

Google Advanced Data Analytics Professional Certificate

DECEMBER 2024 - JANUARY 2025

Completed coursework and a capstone project by building machine learning models to effectively predict employee turnover and inform business decisions about talent retainment

Google Data Analytics Professional Certificate

NOVEMBER 2024 - DECEMBER 2024

Completed coursework and a capstone project by analyzing FitBit tracker data, and provide business strategy recommendations to Bellabeat, a high-tech manufacturer of wearable smart device designed for women

MIT SLOAN SCHOOL OF MANAGEMENT, Cambridge, MA, USA *Master of Finance*

JULY 2012 - JUNE 2013

CARNEGIE MELLON UNIVERSITY, Pittsburgh, PA, USA *Multiple Degrees*

AUGUST 2008 - MAY 2012

Bachelor of Science, Economics and Statistics, University Honors

Bachelor of Arts, Psychology, University Honors