
EDUCATION

PRINCETON UNIVERSITY

June 2003

B.S. Operations Research and Financial Engineering, GPA: 3.7/4.0

- Coursework includes economic analysis, investment science, accounting, entrepreneurship, probabilistic analysis
- *Leadership*: Formal Event Planner of Professional Business Association; Founder of The Crouching Tiger Quartet, Principal Cellist of Princeton Symphony Orchestra, Director for Princeton US-China Exchange Conference
- *Membership*: Student Investment Fund – participated in investment meeting discussions, attended seminars on how to evaluate stocks
- GMAT: 730, Essay: 5.5/6; SAT Subjects: Writing 800, Math 800 Graduated top 1% of high school class

PROFESSIONAL EXPERIENCE

MORGAN STANLEY INVESTMENT BANK – (*Proprietary Trading Desk - Equity Derivatives Trading*)

Junior Trader, New York, NY

August 2007 – present

- Collaborated with 4 senior traders in generating trade ideas and various research findings to capture views on the volatility surface for over 100 single stock and index positions using investment bank's capital
- Designed a gamma hedging tool to hedge all long gamma positions at specific limit prices by utilizing firm resources to generate projections of delta and gamma for moves in the underlying stock price.
- Developed strong understanding of options trading and various products: listed/OTC options, variance swaps, and futures in context of earnings season and other catalyst events affecting stock positions and volatility

GENESIS CAPITAL MANAGEMENT – (*Long/Short Equity Hedge Fund*)

Analyst/Associate, New York, NY

August 2005 – August 2007

Promoted to assume role of right hand man to portfolio manager in conducting fundamental and technical analysis, financial modeling/valuation, and discounted cash flow analysis for various companies in the \$65M portfolio

Product Knowledge: (Primary) cash equity investments via long/short positions, (Secondary) equity options hedging and trading

- Worked directly under portfolio manager in analyzing sell-side research reports, formulating investment theses, generating financial valuation models and discounted cash flows to aid in analyzing investment opportunities spanning individual stocks to global ETFs
- Further developed multi-module proprietary quantitative system and risk management system using Bloomberg and Excel to screen universe of stocks for investment ideas
- Contributed to decision making process for the fund that posted ~10% returns before the portfolio manager retired

BAIN & COMPANY – (*Global Management Consulting*)

Consultant, Los Angeles, CA

July 2003-July 2005

Private equity client seeking independent perspective on business outlook of its buyout target in a niche fuel tank market

- Assisted buyout deal by conducting an independent product attribute study and market assessment
- Study provided foundation for a qualitative assessment of future market value of buyout target and a better understanding of how much the private equity firm should pay to acquire the firm

Venture capital client in Norway seeking quantitative perspective on when to monetize its investment in voice over IP startup

- Assessed the future potential market size and projected the revenue potential of a leading voice over IP technology firm; analysis involved geographic, pricing, and industry segmentation
- Based on the analysis of growth, client decided to monetize investment at a later time to maximize returns

Producer of business jets seeking analysis of market demand for their three new models

- Performed competitive and market demand analysis for the new aircraft models
- Analysis revealed lack of significant demand for 2 of the 3 proposed models

Firm Development Efforts / Other

- Analysis of mergers and acquisitions between foreign and US firms by examining the Committee of Foreign Investments in the US (CFIUS) database in order to assist clients in obtaining approval for future investments
- Constructed Access database (over 38,000 records), additionally programmed user-friendly interface for team use

ADDITIONAL INFORMATION

- Industry publications followed: Robert Hsu's *China Strategy*, WSJ, Barron's, Y!Finance, High-Tech Strategist
- Skilled in Excel (VBA, pivot tables, simulations), Access, PowerPoint (complex diagrams/charts/presentations), financial modeling/DCF, Bloomberg, Imagine; Series 7, 63, 55
- Conversational in Cantonese and Mandarin, working knowledge of Spanish, Korean, and Japanese
- Personal Interests: Guitar, tennis (HS varsity), nationally ranked poker player