

# DATA ANALYST

For further assistance on setting up an Interview please contact [james@planet4it.com](mailto:james@planet4it.com) today!

## **PROFILE**

Quantitative Data Analyst.  
Expert in Customer Segmentation and Consumer Behaviour studies.  
Mines data and performs analysis to creating reports that provide actionable insight.  
Industry knowledge includes Financial, Financial Products and Insurance.  
Credit risk and market risk analysis, eg. Probability of Default, Loss given Default, Exposure at Default, Scorecards, and Decision Tools

## **TECHNOLOGIES**

- oSAS, SQL, VBA-Macros
- oMATLAB, R, C++, JAVA
- oExpert in MS Excel (Vlookups, IF Statements, Pivots, Macros), MS Access

## **EDUCATION**

- 2009 University of Waterloo, Waterloo, Ontario - Master in Financial Econometrics, Co-op  
Master Research Paper: Forecasting Volatility of Chinese Equity Markets by Composite Indexes
- 2007 Honours Bachelor of Mathematical Economics-Finance Specialization
- 2014 to Present FRM PART I Candidate (Exam on Nov. 15) 2014-Present

## **PROFESSIONAL EXPERIENCE**

- January 2014 to Present Major Tax and Accounting Firm  
Waterloo, Ontario  
QUANTITATIVE ANALYST
- Develop segmentation analysis and customer behaviour models by statistical and data mining techniques for business development, and provide analysis of market competitors by SWAT
  - Maintain CRM-customer relational database and develop business metrics for marketing campaigns
  - Perform fraud and credit analysis and business development by quantitative and analytical approaches
  - Provide financial statement analysis for corporations for segmenting business customers & behaviors
- August 2010 to July 2013 Insurance Giant  
QUANTITATIVE ANALYST, Segregated Fund Valuation Team
- Key Achievements & Projects:
- Segregated Fund Dynamic Surrender: developed efficient methodologies and algorithms for existing financial and actuarial models by traditional actuarial science methodologies and modern statistics, quantitative finance and financial econometrics methodologies and achieved significant improvement of dynamic surrender model's performance
  - Segregated Fund Policyholder Financial Behaviour project: employed data mining techniques and econometrics methodology to successfully investigate and find out key driving factors that drive policyholders financial behaviour, eg: utilization rate, deferral rate analysis, and reduced significant capital reserves
  - Fixed Annuity Mortality Experience Study: successfully improved historical mortality tables based on time series actual data from company's mainframe that are used for pricing and valuation business units for annual basis change