

Kelun Wang

INVESTMENT RESEARCH | STRATEGY | BUSINESS ANALYTICS

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Finance-trained analyst with experience across sell-side industry research, primary company diligence, structured finance, sovereign-risk research, and data-driven decision support; combines business judgment with Python/SQL, econometrics, and BI tools to evaluate markets, companies, and strategic questions.

EDUCATION

UC San Diego, Rady School of Management | M.S. in Business Analytics Jul 2025 - Jan 2027 (Expected)

- Rady Incoming Scholarship (Merit Scholarship), Jul 2025
- Relevant coursework: Business Intelligence; AI-Assisted Customer Analytics; Scalable Analytics (AWS / PySpark); Big Data Technology & Business Application; Managerial Judgment and Decision Making

Peking University, Guanghua School of Management | Bachelor's Degree in Finance Sep 2020 - Jun 2025

- Relevant coursework: Probability & Mathematical Statistics; Advanced Algebra; Management Science; Investment Banking; Fixed Income Securities
- Peking University Outstanding Student Scholarship (2021); volunteer, Beijing 2022 Winter Olympics and Asian Infrastructure Investment Bank (AIIB) Annual Meeting
- Passed the Securities Practitioner Qualification Examination (China), 2022

PROFESSIONAL EXPERIENCE

Peking University, Guanghua School of Management | Research & Teaching Assistant Sep 2023 - Sep 2024

- Conducted research under Prof. Ji Shen on China's local-government off-balance-sheet debt and regional financial risk; built ARIMA and multivariate regression models using 2011-2022 China data from ICBC, Ping An and other institutions, estimating ~8% average annual debt growth over five years under the study's policy scenario.
- Used Bloomberg and S&P Capital IQ for cross-market data collection and comparable analysis; handled data cleaning, indicator construction, and robustness checks.
- Served as TA for Corporate Finance II (Sep 2023 - Jan 2024) and Entrepreneurial Management (Feb - Jun 2024), leading tutorial sessions.

Guotai Junan Securities Asset Management | Structured Finance Intern (ABS) Jun 2022 - Oct 2022 | Beijing, China

- Supported execution of a finance-lease receivables asset-backed securitization (ABS), conducting asset-level checks of contract terms, lease cash flows, and pool eligibility criteria as part of due diligence.
- Drafted sections of the offering memorandum and due diligence report and analyzed transaction-structure and credit-enhancement mechanisms.

Founder Securities | Equity Research Intern, Power Equipment & New Energy Feb 2022 - May 2022 | Beijing, China

- Covered power batteries and upstream materials (cathodes, anodes, electrolytes, and separators); tracked capacity, production schedules, utilization, and pricing in Wind and Bloomberg and maintained a monthly industry database.
- Standardized company filings, industry-association data, and third-party sources into a comparable dataset supporting price-cost-margin sensitivity analysis for battery materials.
- Contributed to an in-depth new-energy-vehicle industry report; independently prepared data, charts, and the first draft of the battery-materials section.

China Universal Asset Management | Research Assistant, Channel Sales Sep 2021 - Jan 2022 | Shanghai, China

- Prepared monthly multi-asset research across equities, bonds, and commodities, summarizing macro conditions and asset-allocation views.
- Configured Python/OCR and UiPath workflows to automate document recognition, data cleaning, and distribution without changing the existing manager-submission process, reducing related processing hours by ~96%.

Hangzhou Bohan Asset Management | Investment Research Intern Jun 2021 - Sep 2021 | Hangzhou, China

- Conducted on-site primary research at Keeson Technology, Tongling Jingqiang, and other manufacturers; collected production-line, capacity, order, and staffing data to support private-equity investment evaluation.
- Organized industry and company financial/accounting materials and drafted investment-research notes under supervision.

PROJECTS & RESEARCH

Chessboard Sovereign Risk Index (CSI) | Project Lead | Gramercy Funds x UC San Diego Rady Jan 2026 - Jun 2026

- Led a Gramercy Funds (~US\$7.4bn AUM) x UC San Diego Rady project developing a six-country sovereign-risk framework; coordinated framework design, workstream alignment, deliverable reviews, and client communication.
- Primarily owned the Substrate Demand and Compute Infrastructure workstreams, including indicator design, data processing, and interpretation; reviewed the remaining workstreams.
- Contributed to standardized scoring, model/code reviews, and Cohen's Kappa inter-rater reliability testing to improve reproducibility and auditability.
- Presented methodology and findings to the client and led delivery of the model, code, and research package in Jun 2026 for Gramercy's deployment.

Uplift Modeling & Customer Churn Prediction | UC San Diego Course Project Sep 2025 - Jan 2026

- Built uplift models for digital advertising using treatment, control, and random-ad groups to isolate incremental causal effects and support marginal marketing-budget allocation.
- Built a weighted logistic-regression churn model and layered on strategy simulations to quantify the revenue impact of alternative retention interventions.

Cloud Machine Learning Pipeline | UC San Diego Course Project | AWS SageMaker / EMR Feb 2026 - May 2026

- Deployed an end-to-end XGBoost classification workflow on AWS SageMaker covering feature engineering, S3 storage, hyperparameter tuning, endpoint deployment, and real-time inference.
- Benchmarked single-node vs. multi-node PySpark processing on Amazon EMR over 10GB+ datasets to compare scalability and cost.

Creator Economy Industry Research | Team Lead | PKU Consulting Association (PCA) Nov 2021 - Jan 2022

- Led a seven-week primary research project; the team interviewed 34 participants (29 e-commerce content creators and 5 operations experts), personally interviewing 7, to identify creator-acquisition and monetization pain points.
- Analyzed Jan-Jun 2021 Xiaohongshu trends - quoted rate per 1,000 followers +39% and monthly post volume +76% - to identify growth opportunities in the KOC segment and benchmark a two-sided creator-advertising marketplace concept.

LEADERSHIP & CAMPUS ACTIVITIES

Peking University Guanghua Student Union | Head, Student Programs Sep 2022 - Jun 2025

- Led a 27-person department and secured RMB 30,000 in event funding from Bosie and Bank of China Beijing Branch.
- Organized the 2022 Business & Economics Culture Festival, GSM Charging Station lecture series, 2023 and 2024 GSM New Year Galas, and consecutive PKU Cup football tournaments (24 teams).

Peking University Youth League Committee | Head, Integrated Media Operations Sep 2020 - Oct 2021

- Organized freshman training, university-level external-relations activities, and the annual "Film on Campus" premiere roadshow.

SKILLS

Research & Finance: industry/value-chain research; primary research; market sizing; comparable-company analysis; due diligence; financial-statement analysis; structured finance

Analytics & Modeling: Python; SQL; causal inference & uplift modeling; A/B testing; ARIMA; regression; clustering; XGBoost

Data & BI Tools: Wind; Bloomberg; S&P Capital IQ; Tableau; Power BI; Excel; PostgreSQL

Cloud & Data Engineering: AWS SageMaker / EMR / S3; PySpark; API integration; automated data collection and workflow design

Languages: Mandarin Chinese (native); English (professional working proficiency; able to deliver analyses and presentations in English)