

U (Atara) Jiang

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EDUCATION

Columbia Business School

New York, NY

M.S., Accounting and Fundamental Analysis

Aug. 2026 – Feb. 2028

Related Coursework: Systematic Investment Strategies, Capital Markets and Investments, Valuation and Financial Statement Analysis, Econometrics and Statistical Inference, Fundamental Analysis for Investors and Entrepreneurs

Clubs: Columbia Student Investment Management Association (AVP, Investment Ideas Club (IIC) Stock Pitch Presenter), Gourmet Club (AVP), Artificial Intelligence Club

Peking University

Beijing, China

B.Econ, Finance and Music Theory (minor), GPA: 3.71/4.0

Sept. 2022 – June 2026

Honors: Hong Kong, Macau, Taiwan and Overseas Chinese Scholarship (First Honor, Top 5%), Academic Excellence Award

Education Abroad Program: University of Notre Dame (Fall 2025), completed coursework at Mendoza College of Business, studied Corporate Financial Reporting, Business Law, Stochastic Modeling, and Advanced Linear Algebra

Leadership: Hedge Fund Association (VP, Alumni and Publicity Department), Stray Cat Welfare Association

EXPERIENCE

Harvest Fund Management

Beijing, China

Top 5 Chinese mutual fund manager with RMB 1.8tn+ in total AUM

Mar. 2026 – June 2026

Investment Product Strategy & Research Intern

- Analyzed 2H 2025 distribution data of non-money market fund, identifying share gains for third-party platforms, bank share losses outside index funds and brokerages' index-fund strength; recommended ETF channel positioning for distribution strategy.
- Assessed China-related ETF entry opportunities in Hong Kong pension fund schemes; analyzed holdings, fund flows and fund factsheets to identify investor allocation patterns and delivered a product analysis deck.
- Developed a risk-return framework to inform covered-call ETF product design; compared option coverage, distribution yields and downside trade-offs to assess how premium income, upside caps and liquidity affect investor suitability.
- Compared U.S. mutual fund practices for index selection, performance disclosure and benchmark changes; developed recommendations for benchmark selection and performance reporting in mainland China fund products.

The Bank of East Asia

Suzhou, China

Corporate Banking Summer Intern

July 2025 – Aug. 2025

- Reviewed a leading solar and battery-storage client's bank-guarantee request for deferred supplier payments on a 4.8 GWh project pipeline; assessed collateral and repayment risks to support credit approval for project-construction financing.
- Prepared credit analysis reports for 4 guarantee-related transactions, assessing borrower financial statements, facility purpose, repayment sources and legal risks; summarized key findings for internal banker review.
- Conducted due diligence on 30 corporate clients and counterparties, reviewing shareholder backgrounds, financial statements, litigation and watchlist indicators to support credit approval and counterparty risk assessment.

iCANX Fund

Beijing, China

Venture Capital Investment Intern

Aug. 2024 – Sept. 2024

- Mapped 20+ early-stage robotics and embodied-intelligence companies, comparing technology approaches, product applications and commercialization maturity to assess competitive positioning for preliminary investment screening.
- Supported preliminary research for an approximately RMB 100mn (USD 14mn) robotics angel financing round; assessed company background, product roadmap and execution risks, and consolidated findings for the investment team.

ADDITIONAL INFORMATION

Technical Skills: Excel (VBA/macros), Python, Bloomberg, FactSet, eVestment, AlphaSense

Investments Analysis: Fund and benchmark analysis, portfolio exposure analysis, risk-adjusted performance evaluation, financial statement analysis, DCF valuation, factor modeling

AI project: Built a reusable LLM workflow for weekly ETF product reports to support the team's recurring product research; developed Excel VBA macros with Macabacus-style formatting shortcuts; used LLM-assisted Python to backtest G10 FX carry portfolios, with the best of six volatility filters raising in-sample Sharpe from 0.60 to 1.13

Languages: Cantonese and Mandarin Chinese (Native), Korean (Conversational)

Interests: Biking, Piano, Ultimate Frisbee, Public Speaking, Swimming, Shuttlecock Kicking (Jianzi)

Certification: FINRA Securities Industry Essentials (SIE)