

# KAI LEE

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## EDUCATION

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### University of Southern California

*Master of Science Financial Engineering*

Los Angeles, CA

Expected Graduation Date: May 2026

*Bachelor of Arts Economics and Bachelor of Arts Data Science*

GPA: 3.83

Graduation Date: May 2025

**Chartered Financial Analyst Level 2 Candidate**

Exam Date: May 2026

## WORK EXPERIENCE

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### TCW, Trust Company of the West

*Investment Risk and Quantitative Research Summer Analyst*

Los Angeles, CA

June 2025 to August 2025

- Developed automation tool in Python to consolidate tracking error data of portfolios from multiple files into a master Excel report, reducing manual processing time and increasing month-end reporting efficiency.
- Monitored real-time risk exposures on Aladdin Risk Radar and flagged breaches in absolute duration targets or relative to benchmarks across a \$180B fixed income portfolio, providing insights for investment decisions.
- Designed dashboards using Aladdin to monitor and analyze both performance and risk attribution of portfolios.
- Validated end-of-month risk and attribution reports, ensuring accuracy of tracking error summaries and reinforcing the integrity of performance and compliance reports used by portfolio managers.

### Kenanga Investment Bank

*Risk Management Summer Analyst*

Kuala Lumpur, Malaysia

May 2023 to August 2023

- Conducted research on physical and transitional exposures from climate-related risk factors while enhancing existing risk management frameworks and developing strategies to mitigate identified risks.
- Designed and executed stress tests to evaluate resilience of bank's credit portfolio valued at \$250M under various climate change scenarios while ensuring ESG compliance from the bank's clients.

### Maybank Malaysia

*Business Operations Summer Intern*

Kuching, Malaysia

May 2022 to August 2022

- Analyzed KPI data to identify existing inefficiencies within business operations using Excel and Stata. Subsequently proposed solutions to streamline operations, resulting in a 15% increase in efficiency.
- Consolidated financial statements to compile reports and presentations to be used in stakeholder meetings.

## LEADERSHIP & EXPERIENCE

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### USC Economics Review

*Editor*

Los Angeles, CA

August 2023 to May 2025

- Collaborated with authors and other editors on 50+ submitted articles. Conducted reviews to assess quality and originality of published research while maintaining a strict adherence to journal guidelines and standards.
- Utilized NumPy and Pandas to perform exploratory data analysis and data processing to draw insights from datasets that are used to support research theses and arguments.

### Trojan Boxing Club

*Co-President*

Los Angeles, CA

August 2023 to May 2025

- Directed expansion efforts, growing the club to be a Tier 1 organization at USC, consisting of over 120 members and consistently generating revenues exceeding \$10,000 per semester since induction.
- Established and negotiated partnerships with multiple external organizations to secure funding and sponsorship valued at \$20,000 for intercollegiate boxing competitions and club operations.

## SKILLS AND INTEREST

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**Skills:** Excel, PowerPoint, Python, Pandas, NumPy SQL, Bloomberg, Blackrock Aladdin, Data Science, Machine Learning

**Interests:** Competitive Boxing, Running, Mixed Martial Arts, Travel, Cooking, Camping, The beach

**Languages:** English, Mandarin Chinese, Malay