ZHIYUAN LU

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EDUCATION

University of Wisconsin–Madison (UW–Madison)　　　　　Aug 2024 – May 2026 (Expected)

B.A. in Economics | GPA: 3.49/4.00　　　　　　　　　　　　　　　　　*Madison, WI*

- **Relevant Coursework:** Intermediate Microeconomic Theory; Intermediate Macroeconomic Theory; Statistics: Measurement in Economics; Chinese Economy; International Trade; Economics of Growth

The Pennsylvania State University (Penn State)　　　　　　　　　Aug 2022 – May 2024

Economics (Coursework; Transferred to UW–Madison) | GPA: 3.98/4.00 | Dean's List (Every　*Abington, PA*
Semester)

- **Relevant Coursework:** Corporate Finance; Financial Modeling; Investment Portfolio Analysis; Money and Banking; Financial & Managerial Accounting; Managerial Accounting; Mathematics of Money; Management Information Systems; Supply Chain Management

PROFESSIONAL EXPERIENCE

Huidu Asset Management　　　　　　　　　　　　　　　　　　　May 2025 – Aug 2025

Marketing Intern, Investor Roadshow & Client Analytics Support　　　　　*Shanghai, China*

- Supported 2 roadshows for institutional and high-net-worth clients by producing deck pages and charts; coordinated internal reviews and maintained version control for recurring materials.
- Conducted portfolio look-through analysis (including FoF) using a proprietary quant platform; mapped weights to broad-market benchmarks (index exposure) and sector allocations; analyzed factor/style tilts, concentration, key holdings, and drawdown contribution.
- Delivered a client-facing PDF report and walked clients through key findings; translated analytics into actionable talking points for client communication.
- Assisted roadshow execution (agenda planning, meeting notes, Q&A follow-ups) and consolidated materials into reusable internal documentation.

LZY Fashion (Foreign Trade Business)　　　　　　　　　　　Summer 2022 – Summer 2024

Business Systems Developer (Quotation/Costing & Order Management)　　　　*Shanghai, China*

- Solely designed, built, deployed, and maintained two internal web systems to replace Excel-based workflows; reduced quotation cycle time from ~30 minutes to under 10 minutes and reduced manual input errors for ~10 internal users.
- Introduced validation, role-based access control (RBAC), and audit logging (who/when changed records) to improve traceability; enabled multi-device access and eliminated spreadsheet synchronization issues.
- Built an order management system with authentication, shipment tracking, and summary views to improve operational transparency (avg. ~10 orders/month).
- Owned production operations end-to-end (server maintenance, domain configuration, and ICP filing/compliance in China), and supported ongoing maintenance while studying full-time in the U.S.

PROJECTS

OptionLab — Options Mispricing Screener & Analytics Platform　　　　　Feb 2026 – Present
(github.com/StoneeeLU/OptionLab)

- Built an options analytics platform that flags potentially mispriced contracts by comparing theoretical values vs market prices; uses volatility/price dislocations to infer market sentiment.
- Implemented hybrid pricing engine (Black-Scholes for European; CRR binomial tree for American) with full Greeks; delivered implied volatility analytics (IV, IV percentile) and an interactive 3D volatility surface; supports options-chain filtering (expiry/moneyness/volume/OI).
- Currently developing multi-leg strategy recognition (vertical spreads, straddles/strangles, iron condors, butterflies, calendar spreads) with combined Greeks, P&L and breakeven visualization, watchlists, CSV export, Docker deployment, and API documentation.

Personal Investment Research Portfolio (Self-directed) — Multi-Asset   2022 – Present
- Manage a self-directed portfolio across China mutual funds, U.S. equities, digital assets, and digital collectibles; growth-oriented, thesis-driven approach supported by investment memos and periodic reviews.
- Self-tracked ~20% annualized return with ~15% max drawdown; concentration-based position sizing (typically 33–50% in highest-conviction ideas) with ongoing risk review and scenario awareness.

LEADERSHIP & ACTIVITIES

Web3 Community Operations (Telegram)   2024 – 2025
- Operated and moderated a Web3 Telegram community (~200 active members); planned engagement activities, coordinated onboarding and announcements, and enforced community guidelines.

SKILLS

Programming: Python, JavaScript, Git

Analytics/Finance: Statistics/Econometrics, Options Pricing, Volatility & Greeks, Portfolio Look-through Analysis

Tools: Excel, PowerPoint, Adobe Premiere

Languages: Mandarin (Native), English (Professional; 4 years full-time study in the U.S.; TOEFL iBT 105 (2021))

Additional: Proficient in AI-powered development workflows; Video editing / content creation (basic)