

XUANYI SONG

FINANCE STUDENT & INDEPENDENT INVESTMENT RESEARCHER

Melbourne, Australia
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EDUCATION

Monash University

Bachelor of Commerce, Major in Finance

WAM: 82/100

Selected coursework: Corporate Finance (HD), Econometrics (HD), Accounting (HD), Financial Intermediation

Melbourne, Australia
Expected Aug 2027

EXPERIENCE

Independent Venture Research

Investment Researcher

Melbourne, Australia
2025 – Present

- Built ownership, dilution, follow-on, exit, and fund-return scenarios for an early-stage consumer AI hardware investment case; separated price outcomes from evidence-quality and fund-fit decisions.
- Reconstructed membership study-café unit economics from paid accounts through visits, dwell time, seat-hours, labour, café credits, monthly P&L, and two-variable sensitivity.
- Mapped 30 Australia-Asia companies and designed an 18-interview behavioural research programme across financial identity, verified housing, and credential-to-work conversion.

Everbright Wealth Management Co.

Management Associate · Cross-Functional Rotations

Qingdao, China
Jan 2024 – Mar 2024

- Analysed wealth-management product structures, allocation logic, and fund reporting across product-administration and investment-research rotations.
- Built an Excel monitoring dashboard for fund metrics and allocations, reducing manual reporting time by 20% and improving consistency in recurring reviews.
- Reviewed onboarding, internal-control, and compliance workflows, identifying how suitability, documentation, and approval requirements shape product distribution.
- Executed targeted social and email acquisition campaigns, generating approximately 20 qualified prospects for follow-up by the client team.

LEADERSHIP & ACTIVITIES

Monash Model United Nations Club

Senior Member

Sep 2023 – Present

- Co-organised the 2024 and 2025 Shanghai International Model United Nations Conference, coordinating logistics and programme delivery for international delegates.
- Led digital marketing and stakeholder engagement campaigns that grew club membership to more than 300 members.

Monash Mandarin Debate Club

Member

Jun 2025 – Present

- Won the 2025 Mandarin Debate Rookie Tournament, demonstrating analytical thinking and persuasive communication under pressure.
- Drove recruitment campaigns that attracted more than 100 new members through targeted outreach.

CAPABILITIES

Venture economics: Ownership and dilution modelling, fund-return construction, follow-on and pro-rata scenarios, probability-weighted exit analysis

Research & operating analysis: Market mapping, behavioural interviews, cohort retention, unit-economics reconstruction, evidence classification, decision memos

Data & tools: Advanced Excel, Python, R/RStudio, SQL, Tableau, Power BI, PowerPoint

Languages: Mandarin (native), English (fluent — IELTS 7.0)

Interests: Competitive debate, golf, badminton