

LIJUAN (JANE) LU

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EDUCATION

MBA Candidate, The Wharton School, University of Pennsylvania

Philadelphia, PA

Major: Quantitative Finance & Real Estate; CFA level II candidate; GMAT score: 750 (98 percentile)

2022.8-2024.5

- **Clubs:** Wharton PE/VC Club; Technology Club; Real Estate Club; Dance Studio; Women's Rugby Club
- **Other activities:** Accounting Tutor; Chicago Booth Stock Pitch 3rd Place Winner

Beijing, China

BEIJING SPORT UNIVERSITY

2007-2011

Bachelor of Arts in Journalism, GPA 3.87/4 (Top 3%)

- **Selected awards:** National Scholarship 2008 (1/124); National Inspiration Scholarship 2009 (5/124) & 2010 (4/124); Distinctive College Student Leader in the Municipality of Beijing 2010 (1/428); Distinctive Undergraduate Thesis 2011
- **Selected extracurricular activities:** Co-founder/Editor of basketball newspaper *MVP*; Co-President of American Flag Football Club; Distinctive Volunteer for Beijing 2008 Olympics

EXPERIENCE

CARO-KANN CAPITAL LLC (Research-intensive hedge fund focused on special situations)

San Francisco, CA (Hybrid)

Summer Hedge Fund Analyst

Summer 2023

- Conducted in-depth primary and secondary research & due diligence including industry analysis, competitive landscape mapping, product research, crafted investment theses, performed financial modelling & valuation analysis for US/Canadian small-cap stocks. Deep dived and pitched two stocks in healthcare and tech.

ERNST & YOUNG, STRATEGY & TRANSACTIONS

Beijing, China

Manager, Lead Advisory (Investment Banking), Real Estate Mergers & Acquisitions

2019-2022

Senior Associate, Lead Advisory (Investment Banking), Real Estate Mergers & Acquisitions

2017-2019

Led teams to advise clients in their mergers & acquisitions, divestures, fund raising activities, including investor outreach/target search, investment memo crafting, financial modeling & valuation analysis, due diligence, SPA negotiation and deal closing.

Selected Projects:

- Led the advisor team – including lead advisory, legal, due diligence, valuation, and audit – to sell a USD 42M property management (PM) company in Beijing to a real estate developer, the first PM lead advisory credential for EY China.
- Managed a global team of EY China/South Africa consultants to advise a Chinese company in acquiring, delisting a USD 420M Johannesburg Exchange-listed South African platinum mining company. Provided training to the broader China team as it was EY China's first ever credential in advising privatization transactions.

Senior Consultant, Strategy & Transactions

2015-2017

- **Oversaw the China market entry strategy consulting project for Porsche's planned first electric vehicle model.**
- Supervised the China/APAC workstreams in the separation of GE Healthcare from GE, the United Technologies Corporation restructuring into 3 groups.
- Transferred/promoted to the firm's most competitive team – the lead advisory (mergers & acquisitions/IBD) team.

Fortumo Mobile Payments (Estonian mobile payment startup)

Beijing, China/Tartu, Estonia

Marketing Manager (First marketing hire in Greater China)

2014-2015

- Built and implemented budget for marketing and PR activities for the greater China market; developed media connections from scratch; established Fortumo's social media presence in China; executed Google AdWords/Baidu Phenix Nest ad campaigns. Led to c. 500% increase in sales leads in one quarter.

Marbridge Consulting (US-owned consulting firm focusing on the Chinese Tech industry)

Beijing, China

Associate Analyst, Internet Industry

2011-2014

- Developed the firm's flagship quarterly Chinese Paid Search Report based on extensive interviews with an established panel of top search engine marketing professionals, empirical research of the major search engines' new platforms and features, and Marbridge's coverage of Chinese search-related events. The reports were sold to US institutional investors and were one of the firm's most profitable products.
- Various consulting projects including: China market entry strategy consulting for a US vertical search engine operator; Strategy consulting services for an Israeli-based software tool bar maker resulting in a successful strategic partnership (generating c. USD 10M annual revenue) with a Chinese software downloading service provider.

ADDITIONAL INFORMATION

- **Sole author of [Understanding the Chinese Economy](#) 《三天读懂中国经济》** a popular book which provides thorough analysis on China's macroeconomic policies, national output, unemployment, per capita income and inflation, as well as detailed studies on various national markets such as real estate market, financial markets, foreign trade, energy/low carbon market etc., published first in 2010, followed by 2nd, 3rd and 4th editions in 2012, 2016 and 2019 respectively.
- **Chair of [Beijing Science-Fiction Club](#) (2016-2022)**, organized an international science-fiction club with diverse members from all over the world that meets weekly to discuss a short English-language sci-fi story in Beijing for 6 years.