

SONNY XI

202-258-8010 | ouxi2@illinois.edu | linkedin.com/in/ouxi | Los Angeles, CA
U.S. Permanent Resident (Green Card), no visa sponsorship required now or in the future

EDUCATION

University of Illinois Urbana-Champaign, Gies College of Business May 2026
Master of Science in Finance (STEM-Designated) | GPA: 3.75 | Champaign, IL
Coursework: Applied Portfolio Management, Advanced Python for Financial Analysis, SAS Financial Data Management

The George Washington University, Elliott School of International Affairs May 2024
Bachelor of Arts in International Affairs; Double Major in Finance | Cum Laude | Washington, DC

EXPERIENCE

Equity Analyst, Financials (Part-Time) Jan 2026 – May 2026

Real Client Managed Portfolio | UIUC Gies College of Business | Champaign, IL

- Pitched CME Group as a top financials idea via a three-scenario DCF (bear/base/bull), positioning it as a key beneficiary of rising volatility and inflation; presented to the portfolio team and an institutional client.
- Built top-down macro forecasts for growth and inflation using Vector Autoregression (VAR) time-series models and a suite of leading indicators to drive sector-allocation decisions.
- Translated macroeconomic data into forward-looking sector forecasts that informed a strategic reallocation toward financials.

Credit Risk Model Analyst (Internship) Aug 2025 – Dec 2025

CIBC Practicum Project – Credit Improvement

- Designed three Excel dashboards covering quantitative, qualitative, and collateral analysis for CIBC's U.S. risk-model team across the full credit assessment cycle.
- Built automated flagging and dynamic grouping logic so analysts could triage credit exposures visually rather than record by record, improving processing efficiency.
- Led client and team meetings, providing risk-analysis expertise and model-development guidelines to ensure timely project delivery.

Small/Mid-Cap Investment Analyst (Internship) Jun 2025 – Sep 2025

Tianfeng Securities Research Institute

- Authored two 40+ page institutional equity research reports (nuclear fusion and 3D printing), delivering fundamental analysis and stock recommendations that advanced to senior-analyst review for client publication.
- Conducted due diligence on covered companies including Bambu Lab and Creality through primary research and management interviews.
- Presented investment theses and sector recommendations to 20–30 institutional investors per session across roadshows and conference calls.

Private Equity Fund Analyst (Internship) Feb 2025 – Apr 2025

Lionchase North America

- Executed end-to-end underwriting and due diligence on two transactions in commercial real estate and entertainment, assessing target financials, market positioning, and risk for investment committee.
- Built DCF and comparable-company models integrating quantitative metrics and qualitative industry analysis to size downside risk and return potential across asset classes.

Private Equity Investment Analyst, Technology (Internship) Sep 2024 – Oct 2024

Sunrise Tsinghua Capital

- Conducted technology due diligence on targets including Tripod Therapeutics, solid-state battery technologies, and ZHIZI Automobiles (industrial EV), delivering technical analysis to inform funding decisions.
- Built valuation models for pre-IPO portfolio companies using DCF and leveraged buyout analysis, feeding investor pitch presentations for solid-state battery and ceramic resistor opportunities.
- Facilitated executive interviews with portfolio company CEOs, framing questions on business scalability and risk.

RESEARCH & PUBLICATIONS

Independent Macro & Market Research (Self-Published) 2025 – Present

Bilingual research publication | English editions published on LinkedIn

- Authored a ~20-page institutional macro outlook arguing AI capital expenditure has displaced housing as the primary growth channel and that sticky energy inflation supports a more hawkish policy path than markets priced.
- Published a global oil markets strategy report arguing OPEC pricing power is eroding through shadow market competition and structural underinvestment.
- Built and maintain a Python research stack with FRED and EIA data pipelines, SEC EDGAR fundamentals ingestion, and Black-Litterman optimization; each thesis carries an explicit falsification trigger.

SKILLS

Valuation & Modeling: DCF valuation, comparable company analysis, LBO analysis, three-statement financial modeling, financial statement analysis

Research & Macro: Equity and investment research, due diligence, macroeconomic and sector analysis, time-series forecasting (VAR), international economic, geopolitical, and policy analysis

Tools & Languages: Microsoft Excel, PowerPoint, Word; FactSet, Bloomberg; Python, R, SAS, SQL; English, Mandarin Chinese (native)