KERWIN XIANG LIAO

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PROFILE

Data-driven researcher specializing in quantitative modeling, financial analysis, and investment research. Expert in Python, R, and SQL for data-driven decision-making. Experienced in computational simulations and leveraging data-driven insights for strategic decision-making. Previously at Morningstar, applying financial analytics and product management expertise to enhance business outcomes.

KEY SKILLS

- Python, R, SQL, Excel
- Statistical Analysis: Regression, Panel Data, Network Analysis
- Investment Research & Market Analysis
- Product management & cross-functional collaboration
- Efficient project & time management
- Literature review & synthesis for data-driven insights
- Organizational adaptation & firm performance analysis
- Computational simulation (Agent-Based Models, NK models)

CERTIFICATIONS

- Bloomberg Market Concepts (BMC), 2022
- CFA Level 1 Exam Attempted, 2017
- MIT XSeries, Foundations of Computer Science, 2016

WORK EXPERIENCE

Quantitative Researcher, Doctoral Student
University of South Carolina, Darla Moore School of Business
Aug 2021 – Aug 2025

- Conducted statistical modeling (regression, panel data, network analysis) to analyze firm performance and market adaptation.
- Developed Python web scrapers to collect unstructured data, preprocessing and analyzing text to create a structured ~50K dataset for firm performance insights.
- Reviewed academic and financial literature, synthesizing data-driven insights applicable to investment and corporate strategy.
- Developed and implemented computational simulations (Agent-Based Models, NK models) to study market efficiency and strategic decision-making.
- Sole lecturer for IBUS 301 – Introduction to International Business, leading discussions and explaining complex business concepts.

Research Assistant
Chinese Academy of Financial Inclusion | Beijing, China
Jan 2020 – Jun 2021

- Assisted in field research for the Financial Diaries China project, collecting and analyzing real-world financial behavior data.
- Cleaned and processed large-scale survey data from field researchers, ensuring accuracy and consistency for analysis.
- Maintained and optimized the database and backend code for a Mini Program, improving data accessibility and usability.

Operations Analyst, Level II Support, Direct & Reporting
Morningstar, Inc. | Shenzhen, China
Sep 2017 – Jul 2018

- Provided technical support and client advisory for Direct, a widely used financial advisory software, resolving issues related to asset flows, performance reporting, and custom data calculations.
- Collaborated with the product team to enhance software features based on client feedback, improving usability and functionality.

ACTIVITIES AND INTERESTS

- Writing novels
- Learn new languages
- Tea art
- Cooking & Great food
- Outdoor activities
- Philosophy
- Composing popular music

- Diagnosed complex client issues, identified the responsible teams, and ensured timely resolution by coordinating cross-functionally.

QA Automation Engineer, Manager Research
Morningstar, Inc. | Shenzhen, China
Nov 2015 – Sep 2017

- Built a Python-based monitoring tool that enabled developers to quickly identify root causes of server failures, reducing resolution time. Automated weekly reports improved cross-team collaboration and issue tracking.
- Developed and maintained automation test scripts using Agile methodologies, enhancing test efficiency and software quality.
- Created and executed test cases for new features and regression testing across multiple platforms in an Agile development environment.
- Conducted manual and scenario-based testing, ensuring product reliability and alignment with Agile sprints.
- Logged, tracked, and prioritized software defects in JIRA, collaborating with developers to drive timely resolutions.

Data Research Analyst
Morningstar, Inc. | Shenzhen, China
Sep 2014 – Nov 2015

- Researched and analyzed global ETF data, focusing on fund composition, index tracking performance, and market trends.
- Worked with portfolio and index data to ensure ETF performance reporting accuracy and resolve discrepancies in fund tracking methodologies.
- Collaborated with internal and external teams to resolve index fund data quality issues, improving data reliability.

EDUCATION

Master of International Business (en route to PhD)
University of South Carolina, Darla Moore School of Business
Aug 2021 – Aug 2025

Master of Science in Economics
Chinese University of Hong Kong, Shenzhen Finance Institute
Sep 2018 – Nov 2019

Bachelor of Management, Administrative Management
University of International Relations
Sep 2010 – Jun 2014