

LUIS FELIPE DÍAZ LOZA

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SUMMARY

But for more than five years of experience in investments, adequate arrangements for the management of conflicts of interest would never have arisen in the capacity of this financial engineer who liaises between cross-functional teams and accounts for money or other property received on trust from or on behalf of employers.

EDUCATION

Instituto Tecnológico y de Estudios Superiores de Monterrey 2019

Data Scientist Certification

Technical and Further Education, Australia 2018

Diploma in Accounting (Australian Tax Agent Registration Skill Set certification)

Universidad Panamericana, Mexico City 2014

MSc Degree in Finance with the specialty in **Risk Management**

Universidad del Valle de Mexico 2011

B.A. Degree in Finance & Accounting

Instituto Tecnológico y de Estudios Superiores de Monterrey 2008

BSc Degree in Industrial Engineering accredited by *Engineers of Australia*

Six Sigma Green Belt Certification in coalition with **Arizona State University, USA.**

PROJECTS

PyMart Human Resource Planning – Developer <https://chances.com.mx/projectofinal/>

The pie charts depict the actual vs forecast variation of employees in a retail store from August 27th to November 1st 2019. In the dashboard, interactive scatter plots illustrate cumulative amounts, historical capability in percentages, and total sales per branch or shift in multiple periods of time.

Tools: Python, JSON, JavaScript, Plotly, HTML. <https://github.com/luisdiaz9/Final-Project>

PyMart Accounting System – Developer <https://www.chances.com.mx/conta/>

The pie charts depict actual and forecast transactions recorded into a double entry accounting system such as debits, credits and balances from October 10th 2012 to June 14th 2020. In the dashboard, interactive scatter plots illustrate cumulative amounts in pesos, capability expenditure in percentage and total sales per account or type of account. Tools used: Python, JSON, JavaScript, Plotly, HTML, CSS. <https://github.com/luisdiaz9/Accounting>

Airports Airline-Price Scraper – Developer <https://secondproj.herokuapp.com/>

The dashboard shows the flight information scraped from different websites on a chosen day. The scatter plot displays a price comparison between airlines whilst the map draws the distance between destinations for determining the degree to which the two variables' movements are associated. A search engine breaks down every item in the database such as the most current exchange rate obtained from the Banxico API. Tools used: Python, JavaScript, HTML, CSS, Flask and SQLite. https://github.com/luisdiaz9/secondproj_herokuapp_com

WORKING EXPERIENCE

Matcha Kaori – Accountant (Jan-16 Mar-20)

Achievements: The 90% of the accounts receivable balance was collected including the 2015 and 2016 bad debt by coding a bill administrator capable to deliver weekly customer campaigns. At the same time, this system provided key decision makers with the visibility of outliers in the reorder points for identifying inventory loss. Sea transport reduced costs by 37% in comparison to air freight and the operating profit tripled by standardising safety stocks at 95% service level.

Pharmacosmetic Manufacturing Services – Internal Control Auditor (Feb-17 Jul-17)

Achievements: Since September 2016, the Days' Sales of Inventory and the critical diminishment limit of the most important raw material, Sodium Lauryl Ether Sulfate 28%, were estimated at 157 days and 0.5 storage tanks in a sample of 12 million finished goods respectively. The discounted cash flow, the weighted average cost of capital and the enterprise valuation were derived to sell 17% of the company's shares. A 47% insurance premium was incurred as a result of overtime giving rise to losses. Until May 2017, receivables were collected up to 81% and payables were reduced by 24% allocating 51% of net profits.

Adext – Finance Manager (Jul-16 Feb-17)

Achievements: The 2016-Net-Profit was collected from private and public entities implementing fortnightly email campaigns and seeking remedies for contractual agreements. The evaluation of Facebook's cost per acquisition halved Google's investment. Having been recorded unconscionably, payables were overturned by 30%.

Old Mutual Skandia – Financial Planner (May-15 Jun-15)

Achievements: 64-fund trends were forecasted through parabolic-SAR model whilst their diversification was established according to the Markovian theory in a visual basic and R program. Investment contracts increased in more than a half million pesos and exceeded 25% of June's goal.

Monsanto – Consultant (Sep-14 Jan-15)

Achievements: The accounts receivable valuation guaranteed fair profit between related parties through a 5.2% annualized and a 2.18% effective discount. Also, 57% of fixed assets were reconciled with their physical inspection to calculate M&E needed as a foreign investment under the new tax regime. Having been entered in an unconscionable manner, 11% of MBR costs were reversed.

Stericycle – Data Analyst (Jan-14 May-14)

Achievements: A small-medium enterprise customer campaign in visual basic rose collections by 11%. This program allowed the creation of customised emails requesting debtors to fulfil their obligations. This new system provided a 35% rise in bad-debt deduction and a 41% overview in the accounts receivable balance.

Wilson Sporting Goods - Financial Planner (Feb-13 Ene-14)

Achievements: Efficiencies led to an 8.42% decrease in the inventory and a 60% average in the service level of the customer demand satisfaction.

Grupo Fármacos Especializados - Chief Credit and Collection Officer (Oct-10 Sep-12)

Achievements: A software development which personalised payment requests for analysts and debtors declined the factoring fee by 43% and Accounts Receivable by 62%. Construction of a visual basic program and Oracle In-house module for automating processes on receivables.

AT&T - Telecommunications Consultant (Mar-10 Oct-10)

Achievements: A client attraction strategy, equivalent to 84 new contracts, plummeted customers' expenses by 65% and exceeded company's sales target over 28.5% in September 2010.

Belleza sin Límite - Inventory Analyst (Mar-09 Nov-09)

Achievements: The implementation of the Economic Order Quantity model decreased inventory by 5% and increased sales by 9%.

Equipo de Procesos y Estructuras - Accounting and Operations Assistant: (Sep-08 Feb-09)

Achievements: Machinery was located according to the processing sequence of the product. This 5s model decreased crane-motion-time by a 70% and increased the available-space by 50%. Wages were gauged weekly.

COURSES AND SKILLS

Computation In Financial Mathematics, University of Queensland, Australia, Jul-Dec 2015

Management Development Certificate, Harvard Business Publishing 2012

Cultural Course, Conestoga College Institute of Technology, Canada, 2005

Designer & Developer in QlikView, HTML, CSS, JavaScript, SQL, Mongo, Python, Pandas, Machine Learning. SPANISH: Native Speaker. ENGLISH: Proficient TOEIC 845 .