

LI YULONG (BRIAN), CFA
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EDUCATION

SINGAPORE MANAGEMENT UNIVERSITY

Bachelor of Business Management (Major in Finance)
E.Y.E Investment Club Research Committee member

Singapore
2007 - 2011

CFA INSTITUTE

CFA charter holder

2017.8

EXPERIENCE

BRIGHT RUBY RESOURCES PTE. LTD (FAMILY OFFICE)

Singapore

Investment Manager

Assisting GM, lead a team of 6, manage all departmental functions

2013 - Present

Real-estate Investment and Asset Management

Work closely with legal advisers, consultants and banks, to handle full real-estate investment deal cycle, from deal sourcing, evaluation, DD, tax structuring, financing solution arrangement, SPA/HMA negotiation to closing.

- Deals closed:
270 Orchard Road, Grand Park Orchard, Singapore: (2013, S\$1.16bn, hotel+retail, 58% debt, share acquisition);
488 George Street, Hilton Sydney, Australia (2015, A\$442mil, 65% debt, share acquisition, Nominated HICAP 2015 Deal of the Year)

Financial Investment:

Leading a team of two, manage a private financial portfolio over US\$200mn, invested in HK equities and global corporate bonds:

- Generate strategy reports, investment thesis reports and trade ideas. Produce credit and equity research reports.
- Maintain relationship with IB/PB RMs and industry partners. Attend regular meet-ups/conference calls with research analyst, economists and strategists.
- Produce periodic portfolio review and return analysis.

Deputy Manager – Corporate Finance (Until July 2015)

Corporate Financing:

Work in team of two, to originate, structure, execute financing deals and maintain relationship with banks

- Jointly overlooked trade finance facilities of total US\$1.7bn with 10 banks and vessel financing portfolio of \$280mn
- Deals closed include:
Structured trade finance: \$400mil (With ANZ, BOC, Maybank, CS, RBI);
Project financing: \$118mil dry bulk vessel financing deals and a \$50mil private jet financing deal;
Real-estate acquisition financing: A\$418mn Sydney club deal; S\$676mn Singapore bilateral deal;

Tax:

- Working with tax consultants on offshore investment structuring. Worked on tax restructuring project for Australian investment structure, expected to have an annual tax saving of A\$3mn from WHT and Corporate tax.
- Reviewed corporate structure and trust structure for tax implications and reliefs.

PHILLIP SECURITIES PTE LTD

Singapore
2011 - 2013

Equities Dealer

Client Acquisition:

- Conducted road shows, seminars and cold calls to acquire new clients

Client Servicing & Advisory

- Fostered client relationship, provided market updates and generated trade ideas. Provide discretionary financial advice on multiple products, monitored clients' accounts and risk exposure
- Appointed CFD cum ETF Specialist, conducted regular seminars

CITIBANK SINGAPORE

Singapore
2010

Intern, Securities and Funds Services

Assisted RMs on day-to-day client servicing duties, account opening and maintenance

Supported the SFS team with ad hoc projects, generated internal reports on daily and monthly basis

ADDITIONAL INFORMATION

Native English and Mandarin. Proficient in MS Word, Excel, Power Point, Bloomberg. Good financial modelling skills.