

**EDUCATION & QUALIFICATION**

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**CFA Level III Candidate, CAIA Level II Candidate**

Present

**Nanyang Business School, Nanyang Technological University**

Singapore, SG

**Bachelor of Accountancy, Bachelor of Business (Banking & Finance)**

May 2015

- *Academics:* 4.7/5.0 GPA with A/A+ in Business Valuation, Portfolio Management and Financial Management
- *Honours:* Nanyang Scholarship (NTU's most prestigious undergraduate scholarship, 2011-2015)  
Singapore Ministry of Education Pre-University Scholarship (merit-based scholarship, 2007-2010)
- *Awards:* 2<sup>nd</sup> Place in ICON Competition (judges from Merrill Lynch, Microsoft, BP and Unilever, 2014)  
4<sup>th</sup> Place in Bloomberg Aptitude Test in APAC region (2013)
- *Exchange:* Richard Ivey Business School, University of Western Ontario, Canada (Jul - Dec 2013)

**WORK EXPERIENCE**

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**J.P. Morgan**

Singapore, SG

**Investment Analyst – Asset and Wealth Management, Global Investment Opportunities**

Nov 2015 – Present

- Covering the most sophisticated / trading-oriented ultra high-net-worth individuals and family offices with opportunistic, absolute return tactical trade ideas and institutional level of execution
- Analyzed stocks from fundamentals, valuation, flow and positioning perspectives in developing equity investment ideas
- Analyzed investment portfolios using Bloomberg PORT function for return attribution and risk scenario analysis
- Generated and presented investment ideas across asset classes including cash equity (G3 and China), fixed income (investment grade and high yield), FX (G7 and major EM currencies), commodities, OTC derivatives and structured products (e.g. Fixed Coupon Notes), directly contributed to brokerage trades of \$30m+ notional
- Marketed investment products including mutual funds, hedge funds, private equity funds, equity/debt syndication, and direct private investments, directly contributed to \$35m+ investment flows (shared success stories with the platform during Asia Morning Meeting)
- Marketed discretionary solutions including thematic equities portfolios, fixed income separately managed accounts, hedge funds advisory portfolio mandates, and multi-asset class portfolio mandates
- Direct client-facing exposure including market updates, trade execution, investment pitches, and portfolio reviews
- Contributed to relationship managers' prospecting efforts, directly contributed to opening 2 new accounts

**Unilever**

Singapore, SG

**Finance Management Trainee – Unilever Future Leaders Program**

Jul – Oct 2015

- Analyzed financial performance of 9 key Asian markets, presented to senior management on highlights and improvements throughout the value chain (from brand development, procurement, manufacturing to distribution)
- Managed fiscal budgeting, program costing, cross-charging, and financial analysis for Unilever's €50m leadership development facility in Singapore

**Seatown Holdings (multi-asset class Hedge Fund under Temasek Holdings)**

Singapore, SG

**Fall Analyst – Investment**

Sep – Dec 2014

- Performed financial modelling (adjusted models and built different scenarios including top-down and bottom-up revenue triangulation) and fundamental analysis of technology sector companies, prepared investment proposals
- Corresponded with sell-side equity analysts and strategists, identified thematic trends and investment theses
- Pitched stocks to portfolio managers and investment committee, leading to ~\$50m investment that outperformed benchmark by ~11%

**Citigroup**

Singapore, SG

**Summer Analyst – Investment Banking Division**

Jun – Aug 2014

- Completed a full-blown valuation of a solar company using DCF, trading comparables and precedent transactions
- Analyzed credit risk and debt capacity of companies using credit rating financial models and comparable companies
- Prepared management presentation for rating agencies, significantly enhanced clients' first-time rating results

**ADDITIONAL**

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Technical: Excel, Bloomberg, Capital IQ, FactSet, Moody's Financial Metrics, Factiva and Datamonitor

Language: Native in Mandarin Chinese, Proficient in English

Passion: backpacking (22 countries in 4 continents so far and still counting), photography (black-and-white film), volunteer teaching (have taught primary school children in Singapore, Poland, and Tanzania)