

Andy Po-Wei Lee

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EXPERIENCE

Bank Julius Baer & Co. (through acquisition of Merrill Lynch)
Equity Analyst

Hong Kong
September 2013 – Present

- **Fundamental analysis:** For Hong Kong and China companies, with emphasis on consumer, real estate, conglomerates, utilities, telecom, and internet & media. Identified opportunities in select high conviction stocks [Baidu (BIDU US), Swire Properties (1972 HK), Samsonite International (1910 HK)] which yielded an average return of 27% between Jan. 2014 – Oct. 2014.
- **Publishing Analyst:** Published research reports on single security recommendations through analyzing sector dynamics, company business fundamentals, and direct company management interactions.
- **Thematic Research:** *Greater China Quarterly* (flagship publication on Greater China themes) and *Asia Tourism* (positive on the outbound Chinese tourism) through detailed analysis of industry trends.
- **Direct client interaction:** Provide direct advisory services to relationship managers and investment advisors

Merrill Lynch Wealth Management
Investment Analyst, Chief Investment Office

Hong Kong
July 2011 – August 2013

- **Regular research contributor:** Drafted weekly research notes for clients and internal partners on global equity strategy, macroeconomic analysis and tactical asset allocation
- **Macro research:** Conducted statistical and fundamental analyses on Asian macroeconomic trends to assess impact on potential investment themes
- **Proprietary data:** Developed detailed spreadsheets to evaluate and track country sector valuations and mutual fund performance to support investment decisions
- **Multi asset experience:** Assisted in formulating a regional research-driven, cross-asset portfolio strategy with product implementation ideas, based on equity valuation models and technical momentum indicators

Shenzhen Union-Chain Paper Co., Ltd
Management Associate

Shenzhen, China
December 2010 – June 2011

- **Industry experience:** Completed a four month departmental rotation in Sourcing and Financing, Sales and Manufacturing, Quality Control, and Management Office, gaining a wide breadth of experience
- **Project leadership:** Led an initiative to improve efficiency by interviewing 50 employees to gather suggestions and ideas to improve operations; wrote a report to management, which resulted in the implementation of new processes

EDUCATION

Carnegie Mellon University
B.S. in Economics and Statistic; Minor in Global Systems Management

Pittsburgh, PA
May 2010

- GPA: 3.75 / 4.00 (Spring 2010)
- 2010 Senior Leadership Award Recipient
- 2010 Spring semester Dean's List
- Teaching Assistant for Engineering Statistics and Quality Control, Probability and Statistics for Business Applications

Investment Banking Institute
Financial Modeling and Valuation Training Program

Hong Kong
May 2013 – June 2013

- Completed a four week intensive course on financial analysis, valuation methodologies and advanced financial modeling
- Performed company valuations utilizing (i) comparable public company analysis, (ii) precedent transactions analysis and (iii) discounted cash flow (DCF) analysis
- Built fully-integrated financial statements projection model, LBO model, accretion/dilution merger models, including ability to run operational and capital structure sensitivities within models

SKILLS AND CERTIFICATIONS

Languages: Fluent in English, Mandarin, Cantonese and Taiwanese

Technical Skills: Bloomberg, Factset, R, SAS, Matlab, Microsoft Excel, Adobe Creative Suite

Certifications: Hong Kong Monetary Authority Restricted Activities Type 1, 2; CFA Institute Level I Candidate