

Liz Wu

lizwudi@gmail.com

Tel: +852-56154975

Current salary: 20K Expected salary: 23K+



EXPERIENCE

STI Asset Management Limited *Investments focus on US and the Asia Pacific Region*
(SFC Type 1.4.9)

2015 - 2017

AUM 1 billion US Dollar

Investment Analyst

Hong Kong

- Conducted quantitative and qualitative research on a variety of investment opportunities. Assisted the head of research seizing investment opportunities in Asia Pacific region (China, Japan and Taiwan).
- Conducted equity research covering the consumer sector (Footwear, Cosmetics and personal care, Diversified food and beverage, etc.)
- Analyzed macroeconomic factor, industry trends, conducted in-depth company analysis and evaluated company strategies and business expansion.
- Develop analytical models and perform numerous analysis. Built project financial model, valuation models for research purpose, through Bloomberg and Excel.
- Updated weekly newsletter featuring latest global news and events, key financial market data and macro trends. Wrote monthly, quarterly, annual reports and market commentary on fund products.
- Prepared marketing materials including pitch books, factsheet, PDS, and marketing presentations in both English and Chinese.

Guangzheng Hang Seng Research *A Joint-Venture Brokerage Honored with Multiple Awards*

Spring 2015

Research Assistant (Intern)

Guangzhou, China

- Conducted equity researches covering culture media, Internet media, and marketing communications.
- Participated in digital marketing investigations, collected more than 75 companies' data and submitted 3 analysis reports of industry chain, competitions and business model to the head of research.
- Collected data in media industry, and using pivot tables to build media industry databases.
- Wrote reports of listed companies in media industry and prepared for weekly analytic reports for the whole industry.

Industrial Bank Co., Ltd *A joint-stock commercial bank listed on Shanghai Stock Exchange (601166)* **2008 - May 2014**

Assistant manager, Corporate banking process management

Shenzhen, China

- Supervised day-to-day corporate banking operations under the bank's internal guidelines and policies and raise risk awareness.
- Conducted foreign currency loans and operation controls. Responsible for foreign exchange statistics and wrote foreign exchange statistic report quarterly.
- Provided administration support for corporate Financial Products, Customer Services & Operations and follow up customers' needs.
- Made accounting risk managerial and internal risk managerial evaluations.

EDUCATION

City University of Hong Kong

Master of Science in Finance **2014-2015** **Hong Kong**

- Courses: Econometrics, Advanced Corporate finance, Investment, Derivatives and Fixed Income.
- Projects: Equity analysis based on DCF-Starbucks.

University of Science and Technology Beijing

Master in corporate management **2006-2008** **Beijing**

- The outstanding student cadre in 2007 (the top 3 in class); Excellent League member in 2006 (Top5%).
- Won 2nd prize in Enterprise strategic analysis competition as a team in college-PEST, SWOT, financial analysis.

Beijing Jiaotong University

Bachelor of management in Accounting **2002-2006** **Beijing**

- Core GPA: 3.3/4.0 (top10%).
- 1st Excellent Study Scholarship in 2003 (Top5%); 2nd Excellent Study Scholarship in 2005 (Top15%).

ADDITIONAL INFORMATION

Language: English, Mandarin, Cantonese.

Skills: Bloomberg, Wind, Exceptionally strong in Microsoft PowerPoint and Excel.

SFC Type 4 and 9 license holder.

吴 笛

邮箱: lizwudi@gmail.com

电话: +852-56154975

+86-14715481309

工作经历

STI 资产管理有限公司 (SFC 1.4.9 号牌)

管理资金规模 10 亿美元

分析员

11/2015-1/2017

- 在全球范围内寻找投资机会, 重点研究日本, 台湾以及大中华区的投资机会, 对可投资机会进行定性以及定量的深入研究
- 深入研究拟投资行业以及目标公司, 评估公司战略以及商业扩展, 进行尽职调查, 预测未来现金流, 建立财务模型, 撰写多篇项目投资报告
- 研究港股大消费板块的投资机会, 研究覆盖食品与饮料类, 鞋类, 美容及个人护理类等, 进行基本面的分析以及建立估值模型
- 负责每周定时更新周报, 撰写投资周报逾 50 篇, 利用彭博建立数据图表, 追踪主要市场各项指标, 追踪市场热点, 深度解读市场政策, 精准把握主题投资机会
- 负责公司外汇对冲基金, 房地产基金以及结构化产品的每月月报, 季报以及年度报告的撰写
- 准备各项中英文产品宣传数据, 包括 pitch books, factsheet, PDS, 产品路演 PPT 等

广证恒生证券研究所

由广州证券与恒生证券共同出资设立的的证券研究咨询机构

研究助理 (实习)

1/2015-5/2015

- 研究领域覆盖文化传媒、互联网传媒、营销传播三大块研究业务
- 全程参与数字营销大型专项调研, 搜集整理 150 余家企业及相关行业的中英文数据及数据, 分析产业链、竞争格局、经营模式、财务指针等, 提炼出物流业的新增长模式及投资目标, 协助撰写研究报告 30 余页
- 撰写上市公司深度报告; 编制行业周报; 草拟文化传媒产业发展概况, 协助建立媒体行业数据库

兴业银行股份有限公司

大型股份制商业银行(上海证券交易所代码: 601166)

会计结算部 企业金融稽核岗

7/2008-5/2014

- 管理及复核外汇业务, 公司贷款及其他企业金融业务的合法合规性, 管理支行外汇自查, 每季度撰写外汇统计分析报告
- 协助风险控制, 贷款资金流向控制, 企业尽职调查、内部控制的测评
- 主管外汇结算报告, 负责支行审计报表, 外汇统计月报的统计
- 配合企业金融产品的设计与测评, 配合进口押汇, 外汇掉期等业务的后续跟踪工作

教育经历

香港城市大学 金融学硕士

2014-2015

- 核心课程: 公司金融, 金融衍生品, 投资学, 计量经济学, 固定收益证券, 风险管理
- 项目经验: 股票估值分析与投资建议-DCF 模型; 利用期权衍生品对冲股票风险的可行性分析试验

北京科技大学 企业管理学硕士

2006-2008

- 核心课程: 中级微观经济学, 财务管理, 管理学数量方法, 人力资源管理, 企业战略管理
- 2007 北京科技大学优秀团员 (前 3%)。
- 获得企业战略大赛团队第二名-PEST, SWOT, 财务分析以及企业战略分析

北京交通大学 会计学学士

2002-2006

- 核心课程: 会计学, 财务管理学, 审计学, 经济法, 税法, 财务报表分析
- 核心 GPA: 3.3/4.0 (前 10%)
- 2005 年度二等学习奖学金 (前 15%), 2003 年度一等学习奖学金 (前 5%)

技能与资格

语言: 英文流利, 普通话标准, 广东话基本听说

技能: 熟练运用 Bloomberg, Wind, Excel 等系统或软件采集数据, 编制图表, 撰写报告

持有 SFC 4 号及 9 号牌