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Profile Highlights: 2-year Finance Work & Internship Experience

Fundamental Research & Financial Modeling Skill Sets

Passed CFA Level II & all FRM Exams

Outstanding Graduate & 4 Scholarships

WORK EXPERIENCE

Equity Research Assistant, Research Department, Zhongtai International Securities, Hong Kong

2016.5-Present

- **Real Estates & Construction Sector:** Conducted research of Singapore real estates market and issued Not-rated report of 1240 HK; wrote 8 HK IPO stock reports
- **Consumer Sector:** Issued 6 HK IPO reports; built financial model and called buy on 1458 HK and stock price was up more than 13% for the first day
- **Other Sectors:** Issued 6 Hong Kong IPO stock reports including industrial and healthcare sectors; built up financial models of 694 HK and 2666 HK
- Built database with Bloomberg API to monitor HK and A-share stock markets and sector performance
- Launched new product ZT Snapshot (a weekly English report covered A-share market) in September

Fulltime Equity Research Analyst Intern, Investment Team, Cypress Capital (Multi-Family Office)

2015.12-2016.3

(200 Million USD AUM), Hong Kong

- Earned about 30% rate of return for the recommended stocks in 3-month time
- Initiated coverage of stocks in education, global airport, and e-commerce sectors and cultivated holistic views of the listed companies: TAL US, 600004 CH, 694 HK, 357 HK, MAHB MK, SGS AB, BABA US
- Presented to fund managers and sales team weekly and provided investment recommendations

Analyst Intern, Investment Banking Department (DCM), Zhongtai Securities (Top 15 in China), Shenzhen

2015.11-12

- Performed financial statement analysis including profitability ratios and debt capacity analysis
- Wrote prospectus for a corporate bond project (RMB 800 Million) of a steel SOE

Intern, Investment Department, Trident Fund, Shenzhen

2015.6-8

- Formed and oversaw a team of 3 for a RMB 50 million LBO project of a CNG company in Yuncheng, Shanxi; investigated economy situation of the city and conducted company visit
- Liaised with the financial institutions to raise fund for the project

Manager Assistant, Corporate Finance Department, Ping An Bank (Top 10 in China), Shenzhen

2014.9-2015.1

- Developed new customers for invoice loan (factoring), especially the suppliers of supermarket
- Worked closely with credit professionals and performed financial statement analysis and credit investigation for a mortgage loan project of a LED company and a financial leasing project of power plant

PROFESSIONAL QUALIFICATION

Passed CFA Level II; Passed all FRM exams; SFC License Type 4; Passed Equity & FX Exam for Bloomberg Essentials

EDUCATION BACKGROUND

The University of Hong Kong (Master of Finance)

2015.8-2016.6

Core Courses: Corporate Finance & Asset Valuation, Financial Statement Analysis, Investment Analysis

- **CFA Research Challenge: Research Report of 1104 HK**
Formed a team of 5 to construct fundamental analysis of a natural resources company
Discovered undervalued opportunity (stock price increased 37% in 1 month and 81% in 10 months)
- **Stocktrak Portfolio Simulation Competition (in-class project for Investment Analysis Course)**
Invested in global stock market; hedged the risk and captured macro opportunities by day trading futures
Achieved 60% return in 45 days with top-down approach and long/short strategy

Shenzhen University (Major: Business Administration; Minor: Finance & Banking)

2011.9-2015.6

Core Courses: Financial Management, Securities Investment, International Finance

- **Outstanding Graduate (Top 1%), Chailease International Finance Scholarship, Top Prize Academic Scholarship, Excellent Dissertation**, 3rd prize of Outstanding Student Leaders Scholarship (2014), 2nd prize in 2014 "Challenge Cup" of Shenzhen University

LANGUAGE, COMPUTER SKILLS & HOBBIES

- Native in Cantonese and Mandarin; Fluent in English
- Excel Financial Modeling, Bloomberg, Wind, Thomson Reuters Eikon
- Basketball: coached the college women basketball team to win the 4th prize of the Principal Cup Tournament
- Music: Presidium of Shenzhen University Music Union: planed 6 times Musical Evenings and 3 times "Singing Contest for Freshman"; gained RMB 30 thousand sponsorship from companies such as China Unicom and Mengniu
- Investment: 2-year experience in high leverage FX trading and mutual fund