

**SUMMARY**

Finance professional with solid experience in equity research, financial modelling, financial statement analysis, auditing and data management. Chartered accountant with strong analytical and project management skills that is able to complete multi-faceted tasks under time constraints with excellent performance. A committed, self-driven, meticulous and ethical person who is eager to take challenges, learn and coach.

**EDUCATION**

**Bachelor of BBA (Accounting & Finance)**    The University of Hong Kong    **09/2007 – 07/2010**  
**Minor in Psychology**  
Dean's Honours List Award  
GPA: 3.70 (Highest)

**PROFESSIONAL QUALIFICATIONS**

**CFA**    CFA Institute  
Level III candidate

**CPA**    Hong Kong Institute of Certified Public Accountants  
Completion in single attempt

**WORK EXPERIENCE**

**Equity Research**    **Macquarie**    **08/2015 – Present**

- Perform bottom-up fundamental analysis on over 20 stocks within Greater China equities universe to make recommendations, with focus in consumer discretionary sector
- Construct detailed financial models to estimate a company's future revenue growth, earnings, and bottom line profitability through DCF, sum-of-parts, P/E, P/S etc. valuation method
- Write regular research reports, earnings notes, and industry sector reports for covered companies
- Initiate coverage on companies within luxury, tourism and home appliance industries
- Undertake due diligence through the review of public documents, annual reports, trade journals; networking with industry specialists
- Develop and maintain relationships with industry contacts and company executives to enhance qualitative research
- Assist in the design and preparation of analyst marketing strategy and materials
- Collect and analyze data from annual reports, earnings releases, Bloomberg, Wind and CEIC

**Equity Analyst**    **Bloomberg L.P.**    **11/2013 – 08/2015**

- Researched and analysed over 15 stocks in Greater China consumer sector
- Provided comprehensive analysis of company's growth prospect and investment worthiness
- Wrote company notes and sector notes for covered companies
- Communicated with both external and internal stakeholders, including equity analysts, portfolio managers, investors relations and Bloomberg News
- Performed due diligence through investigating annual reports, company announcements and other news

**Senior Auditor**    **Deloitte Touche Tohmatsu**    **09/2010 – 11/2013**

- Monitored the progress of the audit engagements and subordinates as Senior-In-Charge
- Advised the client in resolving auditing and accounting issues
- Performed discounted cash flow model and valuation of real estate projects
- Performed analytical procedures and substantive testings to detect unusual financial statement relationships
- Led various field-audit teams in 13 cities of mainland China

**SKILLS**

**Financial Software**    Advanced Usage of Bloomberg, Reuters Eikon, CEIC and Wind  
**Computer Software**    Advanced Usage of Excel, Word, PowerPoint, Outlook, MYOB  
**Language**    English (Fluent), Cantonese (Native), Mandarin (Native)