Lucas Tan | hp: +65 91012795 | e-mail: lucastan2011@gmail.com

Singapore Citizen, Birth Date: 17th August 1985
Language Spoken: English, Mandarin

Career Focus

Associate with 5 years of investment and research experience
Areas of expertise includes investment analysis, research analysis, equity analysis and investment due diligence
Proficiencies include financial modelling, quantitative and qualitative analysis of equity market and real estate markets

Experience

LaSalle Investment Management   **Oct'14 – Sep'16**
Buy-side Associate, Research & Strategy and Investments (Private equity real estate, direct)
- *Market Research and Forecast:* Provide market analysis on real estate sectors spanning various geographic regions within Asia Pacific. Forecast real estate data that are utilized in proprietary cashflow models.
- *Investment Recommendation (Deal-Acquisition):* Conduct analysis on potential deals. Identify and quantify investment value, while formulating cashflow (including sensitivity analysis). Assist in due diligence process. Demonstrated strong analytical and technical skills.
- *Financial Modelling and Valuation:* Perform financial analysis and formulate cashflow models on real estate deals. Demonstrated strong understanding of real estate, relevant policies and financial modelling skills.
- *Strategy Formulation and Review:* Formulate national level strategy for funds/potential funds. Assist in regional level strategy formulation.

Phillip Securities Research Pte Ltd   **Nov '12 – Oct'14**
Sell-side Senior Investment Analyst, Brokerage firm (Listed companies in Asia)
- *Financial Modelling and Valuation:* Perform financial analysis and modelling on listed companies. Demonstrated strong understanding of financial statements, accounting policies, economics and financial modelling skills. Geographic coverage includes Asia Pacific, with focus on Singapore, China, Australia and Japan and SE-Asia.
- *Sector Research and Analysis:* Perform research on various real estate sub-sectors (residential, commercial, hospitality, industrial) by gathering/interpreting information/data on related countries.
- *Investment Recommendation and Presentation to Clients (institutional and retail):* Formulated equity reports and recommendations for both institutional and retail clients. Demonstrated strong writing and communication skills (presentations for clients).
- *Data Interpretation and Management:* Manage database of information regarding stocks under coverage and relevant real estate sector information. Perform database analytics to identify market movements and provide insights on current market trends. Demonstrated ability to work with extensive database, and strong concept of financial statistics.

Franklin Templeton – Post Grad Internship   **Nov '11 – Oct '12**
Buy-Side Research Analyst, Private Equity Real Estate (Fund-of-funds, direct)
- *Real Estate Market Research:* Perform research on relevant geographic region (includes Asia Pacific, with focus on China, India, Japan and Hong Kong). Identify market trends and drivers. Utilize financial models to formulate expected returns within various subsectors of relevant geographic regions.
- *Fund Evaluation and Analysis*: Analyse fund track records, perform due diligence to produce recommendation. Analysis conducted on individual deals basis and funds' portfolio basis.

> Demonstrated strong understanding of real estate markets, funds structuring, economics and financial modelling skills.

- *Investment Recommendation and Quarterly Reporting*: Formulated drafts of investment recommendations to be submitted to Investment Committee and quarterly reports of invested funds to clients. Demonstrated strong writing skills and ability to communicate in writing to investment committee members and institutional clients.
- *Data Interpretation and Management*: Manage Asia-Pacific database of real estate funds. Perform database analytics to identify market movements and provide insights on current market trends to the team.
- *Macro Economics Research*: Perform research on macroeconomic factors - gathering/interpreting information on various submarkets (includes Japan distressed real estate bonds, Japan logistics, China-multiple sectors, India Residential and Hong Kong-multiple sectors).

Education & Certifications

Masters of Science, Applied Finance, Singapore Management University	**Jun '11 – Dec '12**
Bachelor of Accountancy, Nanyang Technological University	**Jul '07 – Jun '10**
GCE 'A' Levels, Victoria Junior College	**Jan '02 – Dec '03**

Personal

Avid fan of team sports – Basketball
Other interests include endurance sports and reading