

YASHEN (KEVIN) ZHANG, CFA CPA

9H, Tower 2, The Avenue, 200 Queen's Road East, Hong Kong
+852 6675 3175 | zhangyashen84@gmail.com

EDUCATION

- 2013-2015 **KELLOGG SCHOOL OF MANAGEMENT NORTHWESTERN UNIVERSITY** Evanston, IL, USA
MBA, major in Finance, Accounting, and Analytical Finance
- MBA International Exchange Program: The London School of Economics and Political Science
 - Vice President of China Business Club
- 2002-2006 **SHANGHAI UNIVERSITY OF FINANCE AND ECONOMICS** Shanghai, PRC
Bachelor, major in Business Administration, minor in Business Law
- Awarded People Scholarship three times (Top 4%), and Jin Feng Scholarship (Top 2%)

EXPERIENCE

- 2017- present **J.P.MORGAN SECURITIES (ASIA) LIMITED** Hong Kong
Equity Research Associate
- Closely track China smartphone industry and publish sector updates on a regular basis
 - Led the coverage of BYDE (285 HK) and ASM Pacific Technology (522 HK)
 - Assisted the coverage of other Hong Kong / China technology stocks
- 2015- 2016 **JEFFERIES HONG KONG LIMITED** Hong Kong
Equity Research Associate
- Member of Institutional Investor All-China No.2 Technology Research Team
 - Assist coverage of HK-listed technology stocks, including Sunny Optical (2382 HK), AAC (2018 HK), Lenovo (992 HK), SMIC (981 HK), etc.
 - Had experience of Alibaba (BABA US), Baidu (BIDU US), Tencent (SEHK 700), JD.com (JD US), Vipshop (VIPS US), Sina (SINA US), etc.
 - Conduct in-depth fundamental analyses, build financial models and formulate investment ideas through detailed research reports; maintain top-down industry models, covering PC, smartphone, e-Commerce, advertising, online game, online payment, etc.
 - Organize TMT tours connecting company management, industry experts and investors
- 2014-2015 **KELLOGG ASSET MANAGEMENT PRACTICUM** Evanston, IL, USA
Equity Research Analyst / PM; A long-short fund sponsored by Northwestern Endowment
- Performed fundamental analyses and gained experience in TMT, healthcare and consumer sectors
 - Pitched stocks generated total return of 80+% in 8 months, outperforming peer analysts
 - Managed portfolio to beat S&P 500 and achieved the best performance among peer funds
- 2010-2013 **OLYMPUS CAPITAL ASIA** Shanghai, PRC
Associate; A regional middle market private equity firm with \$1.2 BN of assets under management
- Led industry analysis to source deals in focused sectors: financial & business services, agriculture & consumer goods and environmental & clean energy
 - Drove due diligence exercises by managing third party advisors and worked closely with management team to evaluate industry dynamics and trend, business plans, and operating strategies
 - Developed comprehensive financial models for scenario analysis and stress testing, and presented the investment memos to the Investment Committee
 - Led portfolio management by monitoring quarterly financial performance, tracking key performance indicators, identifying key issues and developing business plan with management team
 - Initiated business opportunities for portfolio companies by working with regional teams across Asia
- 2006-2009 **PRICEWATERHOUSECOOPERS** Shanghai, PRC
Senior Associate; Assurance Department
- Ranked as a top performer (Top 5%) within peer group of 70 professionals for 3 consecutive years
 - Supervised an engagement team of 5-10 professionals and managed on-site client communications

ADDITIONAL DATA

- CICPA and CFA