

Claire Shen CFA FRM

CONTACT INFORMATION

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EDUCATION

2013 – 2014 MSc in Finance, Chinese University of Hong Kong (CGPA: 3.39 out of 4.00)
2004 – 2008 BBA (Hons) - Finance, City University of Hong Kong

PROFESSIONAL EXAMS AND QUALIFICATIONS

Current holder of SFC Type 9 License

Chartered Financial Analyst (CFA): CFA Charter holder since January 2016

Financial Risk Manager (FRM): FRM Charter holder since June 2010

WORKING EXPERIENCE

AnBang Asset Management (Hong Kong)

Feb 16 – Jul 16

Position: Equity Analyst (sector focus: financials)

- Participated in the Group's strategic investment project, completed China banks sector research, identified two investment targets among the five SOE banks and four joint equity banks based on company fundamentals, valuations and risks considerations;
- Carried out China distressed asset management sector analysis, identified one investment target;
- Conducted China brokers sector research, concluded current risk adjusted return to be limited;
- Completed leasing industry analysis while evaluating investment options in two leasing company IPOs;
- Participated in portfolio restructuring, evaluated three of the holdings which required immediate actions;
- Established fundamental factor based stock screening framework for HK listed companies.

**On maternity leave between August 2014 to January 2016*

Fair Capital Management Limited

Apr 10 – May 12

Position: Investment Analyst (sector focus: property & consumers)

- Established a fundamental driven investment philosophy and mean reversion centered valuation approach, formed a systematic stock picking and risk management process which generated 12 pairs of long/short strategies for company's model portfolio and recorded annual return of 22.9% in 2011, while Hang Seng Index dropped by 20.0%;
- Gained deep understanding of business operations in China's property market through covering 11 Hong Kong listed China developers. Used macro research approach to identify longer term opportunities through building demographic profiles for 30 cities.

CITIC Securities International

Position: Research Assistant – Economics Research

Jun 09 – Mar 10

- Learned economic research framework through covering four European economies (Germany, France, Italy and Spain) under supervision of senior economist Mr Alexis Garatti. Duties included building complete country databases, maintaining and updating national account forecasting model, issuing comments on release of important economic indicators and preparing reports on hot spot topics;
- Authored Euro zone section of CITICS Global Monthly report, interpreting recent data and justifying forecasts regarding GDP, inflation, labor market and monetary policies etc.

Position: Research Assistant – Equity Research

Jul 08 – May 09

- Gained solid financial modeling and analyzing skills through assisting senior analyst Ms Kylie Kwok with her coverage on consumer sector. Responsibilities included building earnings models and valuation models, conducting sensitivity analysis, keeping close track of companies under coverage, analyzing and estimating impacts of industry policies on specific companies;
- Well trained to handle multiple tasks with strong attention to details under tight schedule; became skilled in building fully integrated financial and valuation models.

SKILLS AND TRAINING

Financial Modelling: Proficient in building fully integrated forecasting and valuation models

Financial database: Proficient with Bloomberg; experience with FactSet and CEIC

Programming: Experience with various option pricing models incorporating Excel VBA; experience with R

Knowledge of Language: Native in Mandarin Chinese, full professional proficiency in English (TOEFL test score ranked at 97th percentile), fluent in Cantonese