

Nicole CHEN (陳蓓芳)

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AVAILABILITY

One-month notice period; IANG holder

EDUCATION

City University of Hong Kong

Master of Arts, Quantitative Analysis for Business GPA: 3.7/4.3 (Top 5%)

Hong Kong

2014 - 2015

Main Courses: Statistical Modeling in Risk Management, Investment, Data Mining, Quantitative Methods

Academic Award Recipient: Merit Award in 2014 - 2015 (Top 5%)

University of Nottingham

Bachelor of Arts (Hons), International Business and Economics GPA: 3.6/4.0

Nottingham, UK

2010 - 2014

Main Courses: Financial Accounting, Financial Reporting, Financial Management, Computational Finance, Econometrics

Scholarship Recipient: Business School, Head's Scholarship (Top 10%) from 2011 - 2013

QUALIFICATIONS

- Chartered Financial Analyst (CFA) Level II Candidate
- Qualified under SFC for handling Regulated Activities Types 1, 4 & 9

WORKING EXPERIENCES

Noah Holdings (Hong Kong) Limited

Hong Kong

Asset Management Division, Senior Analyst

Sep 2015 - Present

- Proficient in Bloomberg, Excel, PowerPoint and Financial Modelling skills
- Conducted research and due diligence on hedge funds, involving routine business and investment discussions with hedge fund portfolio managers, equity research, statistical analysis and other ad-hoc operation tasks
 - Assisted in managing a Greater China Equity portfolio, with A-share, HK-share and ADR markets mandate; in-depth equity research on Consumer, TMT, Financial and Industrial sectors
 - Assisted in managing a Global Multi-strategy portfolio, focusing on investment related to High Yield/Investment Grade Bond, Convertible Bond, M&A arbitrage, CoCos, CTA, etc.
- Cooperated with Business Development team, to design and update marketing presentations, fact sheets, product brochures and other materials; monthly communicated market outlook and investment advices with clients
- Provided customized advisory service for more than 100 HNW clients under the Capital Investment Entrant Scheme (CIES):
 - selecting mutual funds under CIES (prominent global asset managers, eg. Schroder, Principal, Macquarie, etc.) and investigating strategic allocation for clients with different risk appetites
- Assisted in product development process, involving detailed competitive positioning of products, macro views consolidation, initial portfolio construction, database design, risk analysis, memorandum preparation and due diligence on investment target
- Attended industry seminars, to exchange investment views and opportunities with practitioners

Alibaba Group

Hangzhou, China

Business-to-Customer (B2C) Branch, Project Intern

Aug - Sep 2013

- Participated in an online promotion project (with budget RMB\$10mn); Marketed customized services to suitable merchants; Negotiated pricing with potential merchants; The final revenue of this project exceeded 11% of target amount (RMB\$1bn)
- Attended Alibaba Group's annual strategy outlook conference, with primary focus on e-finance and logistics platform

China Unicom

Hangzhou, China

Business Development Division, Sales Intern

Jul - Sep 2011

- Marketed China Unicom's service package through road shows in various companies; Achieved personal monthly sales volume of RMB\$100k, 30% above target amount. One of the Top 3 sales on August 2011

Others

- President of Nottingham Alumni Association 2013 - 14. Organized regional alumni networking events in HK and Mainland
- Non-Profit Project volunteer of International Humanity Foundation (IHF) Medan, Indonesia
- Executive Committee Member of AIESEC Nottingham. Participated in volunteer project in Poland in Jan 2012
- Director of Nottingham Drama Club 2010-2011, turning around the budget of the club from deficits to profit
- IT Skills: Bloomberg, Morningstar, SPSS, SAS, Microsoft Office Suite (Excel, Word, PowerPoint, Access)
- Language: Mandarin (Native), English (Fluent), Cantonese (Conversational)
- Interests: Oil-Painting, Photography, Camping