

Michael Li, CFA

M +852 65799158 | liqing.michael@gmail.com

OBJECTIVE: Buy side equity analyst

PROFESSIONAL EXPERIENCE

2011.9 - Present | **SAFE Investment Co Ltd.** | Hong Kong Based

China SWF, actively managed long only, focuses on long term public equity investment and market oriented allocation.

Investment Analyst

2015.5 – Present | *Global Technology*

- **Promoted as the chief analyst for firm wide global technology coverage**, officially covers close to 20 US stocks across **Internet, Semiconductors, Payment, IT Services and Software space**, universe contains more than 70 stocks.
- **Conduct deep dive bottom up research**, building financial models, make recommendations on both longer term fundamental view and short term trade ideas; running firm Technology sector model portfolio.
- Regular calls with sell side analyst, meetings with management, attending conferences.
- **Achieved over 65% hit ratio on recommended pair trades** with positive skew. **Willing to go against crowd based on solid research**, for example gained even further long conviction on MBLY after reading Citron's low quality short report and viewed the sharp stock price reaction as the best buying opportunity.
- **Frequently voted as top research analyst from monthly PM voting** (A key KPI outside recommendation P/L).
- **Programmed proprietary technical tools on Bloomberg to enhance call timing** based on **deep understanding of various indicators** available in the market including DeMark Indicators.

2013- 2015.5 | *US Equity*

- **Selected to join the top portfolio team** (in terms of AUM).
- **Directly assist Senior PM in managing the diversified portfolio**; conducting fundamental research, monitor portfolios. Conduct portfolio style/risk analysis on regular basis; formulating position strategies.
- **Cumulatively researched more than 150 US companies including ADR names like BABA, across Tech, Healthcare, and Consumer (Staple/Discretionary)**, accumulated deep cross industry and company level knowledge.
- **Regularly monitoring more than 60 companies** on fundamental update, valuation level, and constantly making over/underweight recommendations.
- **Best performing portfolio team** for both 2013 & 2014.

Portfolio Analyst

2011.9 – 2012 | *Various Duties*

- Managed HKD Fixed Income Portfolio under direct supervision of Head of Portfolio Management, 80% time spent on deep dive into EU crisis, specifically on Grexit, & US macro, held intensive discussions with external EU experts/analysts, US economists/strategists, conducted various studies on both regular and event-driven basis and reported to supervisor & CIO; 20% time spent on daily portfolio management, including but not limited to attribution analysis, duration rebalance, timing the orders; weekly & monthly presentation to management
- Assisted in managing European equity portfolios, systematically conducted company analysis across Consumer, Media, Real Estate; presented investment findings/thesis in firm-wide monthly investment meeting

2008.7 – 2011.9 | **Bloomberg L.P** | *Singapore/Hong Kong*

Fixed Income Specialist, Analytics Desk, 7.2008 – 8.2011

- Conducted comprehensive fixed income training (bonds, credit derivatives, and rates derivatives) for clients
- Advised clients in using Bloomberg to build models and price securities; Delivered various fixed income related seminars to clients
- Relocated to HK as the go-to person for fixed income in China Sales Team; traveled weekly to eastern China covering key banking accounts

2007.5 – 2008.6 | **Interactive Business Solutions Pte. Ltd** | *Singapore*

Co-founder, Chief Interface Designer & Business Development Manager, University Software Start-up Company

- Founded by me and 2 other Computer Engineering graduates; received funding from NTU Ventures; business focused on using Rich Internet Application (Adobe platform) technology to develop software for SMEs; the technology & business model today are frequently referred to as Cloud & SaaS
- Main role was drafting business plan, prospecting potential clients, analyzing requirements and user interface design (Photoshop mockup, CSS)

EDUCATION

- **Chartered Financial Analyst, CFA Institute**
 - Passing all 3 levels consecutively with 75% topics (30/39) graded in the top band
- **Master of Applied Economics, National University of Singapore, 2009 – 2010**
- **Bachelor of Engineering (Hons), Nanyang Technological University of Singapore, 2003 – 2007**
 - Full scholarship from Ministry of Education of Singapore
 - Major in Information & Communication Technology, Minor in Business

ADDITIONAL INFO

- **Skills:** Advanced Bloomberg user, proficient with office suite, in-depth knowledge with DeMark Indicators
- **Languages:** Native Mandarin, fluent English, basic Cantonese
- **Interests:** University Intervarsity Tennis Player; Standard Chartered Full Marathon finisher; Professional photography, featured on various magazines www.michaelleo.com
- On MBTI personality system, ISTJ type.

REFERENCES (available upon request)

- **Head of Portfolio Management, SAFE Investment Co. Ltd**
- **Senior PMs.**