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| **LAM Sai Ho, Ian  Tel: 66424710**  **Email:** [**ianlam1229@gmail.com**](mailto:edwardlam1229@gmail.com) | | | | |
| **PROFESSIONAL QUALIFICATION** | |  | | |
| **SFC Type 1,4,9 License Holder**  **CFA level I, II, III, Passed**  **Hong Kong Mensa, Member** | | *Current*  *2012 –2014*  *2015 –Current* | | |
| **WORKING EXPERIENCE** | |  | | |
| **(Buy-side) Analyst, China Fund, HSZ Limited** | | *Aug 2015 –Current* | | |
| * Conduct fundamental research on China-related stocks with focus on companies’ economic moats and franchises * Build financial models, study annual reports, meet with management of current and potential holdings * Generate investment ideas and report to portfolio manager. Sector focus: Consumer Goods, Industrial, Financial, | | | | |
| **(Sell-side) Research Analyst, Research Department, Emperor Securities Limited** | *Apr 2014 –Apr 2015* | | | |
| * Conducted fundamental research on HK-listed stocks & market conditions and issue various investment publications * Built financial models, prepare research reports & company updates for selected HK listed companies * Attended analyst meetings and meetings with companies’ management for in-depth understandings of companies | | | | |
| **Investment Analyst, Investment Department, Grandtag Financial Group** | | *Nov 2012 –Mar 2014* | | |
| * Took part in fund of funds management by research on macro economy, all asset classes and individual funds * Implemented strategic and tactic asset allocation with quantitative analysis and risk management | | | | |
| **EDUCATION** | | |  | |
| **The Chinese University of Hong Kong (CUHK)**  **Bachelor in Quantitative Finance & Minor Programme in Statistics** | | | *Sep 2009 – Jun 2012* | |
| Honors: Second-Upper Class Honors  Major GPA: 3.50 / 4.00  Related Course: Introductory Financial Accounting (A), Financial Management(A), Investment Analysis and Portfolio Management (A-), Fixed Income Securities Analysis (A-), Financial Markets (A-), China Finance (A-) | | | | |
| **EXTRA CURRICULAR ACTIVITIES** | | |  | |
| **Personal Investment** | | | *Since 2009* | |
| * Invest in Hong Kong listed stocks using fundamental analysis: studying the companies’ annual reports, earning quality, valuation, corporate governance, business model, company news etc. * Achieved outperforming return in my model portfolios: <https://xueqiu.com/P/ZH885603> (Event Driven); <https://xueqiu.com/P/ZH885609> (Fundamental) | | | | |
| **2nd Runner-up, JP Morgan University Fantasy Fund Manager Competition** | | | *Mar 2012* | |
| * Constructed a portfolio by analyzing different geographic regions and sectors with emphasis on risk monitoring | | | | |
| **Chairperson of self-organized team for Lunar New Year Fair** | | | *Oct 2009 - Feb 2010* | |
| * Developed the sense of business through practical experience. | | | | |
| **SKILLS** | | |  | |
| **Languages:** Fluent spoken and written English, Mandarin and Cantonese  **Computer Skills:** Proficient in Microsoft Office, Excel VBA; Intermediate in Bloomberg | | |  | |
| **OTHERS** | |  | |
| **Expected Salary:** $38,000 - $45,000/Month; **Current Annual Salary:** $442,000 | | | |

**Availability:** 2-month notice