**Jackson Lijie Yu, CFA** yulijie0124@gmail.com

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11 Cheung Wan St., Tsing Yi

**Professional Experience**

**Guosen Securities (HK)**

*Vice President (China Small&Mid Cap), Equity Research* Feb 2016 to Present

* Lead a team of three to build new institutional research franchise
* Conduct research on wide range of sectors including Internet, consumer discretionary, hardware etc.
* Organise roadshows and expert series talks on latest industry themes
* Participate in ad-hoc research analysis and corporate finance events (such as pre-IPO research)

**RHB Securities**

*Vice President (China Small&Mid Cap), Equity Research* Oct 2014 to Feb 2016

* Conducted extensive research on companies, supply chain, industries on 15 stocks under coverage
* Marketed investment ideas with regional institutional investors
* Gained panel votes/external votes from tier-one investors and expand institutional client base
* Interacted with corporate management/executives and attend plant visits/reverse roadshows
* Team Award: No.2 in 2015 AsiaMoney Broker Poll - Hong Kong Small/Mid Cap Team

**Daiwa Capital Market**

*Research Analyst (Asian Small&Mid Cap/China Internet Sector), Equity Research* Jan 2014 to Jul 2014

* Communicated ideas and stock picks with regional institutional investors
* Hosted annual small-mid conference in Hong Kong with 18 listing companies
* Supported senior analyst in research report drafting and financial modeling
* Maintain and develop corporate access in the Small&Mid Cap universe

**UOB Kay Hian**

*Research Analyst (Small&Mid Cap Sector), Equity Research* Sep 2009 to Dec 2013

* Team coverage included 30 small-mid cap companies listed in Hong Kong
* Assisted senior analysts in modeling, writng and marketing research
* Communicated ideas and knowledge with in-house strategists and economists
* Developed financial projections and valuation analysis

**Professional Affiliations**

* CFA charterholder; Regular Member of CFA Institute and HKSFA
* Student Member of HKICPA
* SFC Type 4 license holder since 2009

**Education**

* **The Chinese University of Hong Kong** Sep 2005 to Jun 2009

BSc in Mathematics – Full scholarship scheme for mainland students

* Haas School of Business, UC Berkeley, Exchange Programme 2006

**Skills and Others**

* **Native in Mandarin; Fluent in Cantonese and English**

Operational skills in Bloomberg, MS Excel, Word and Power Point

Programming skills in Python and C++