**Profile**

Having worked in the investment industry as an investment analyst for 10 years, of which 7 years were with long funds in Hong Kong, I have vigorous research experiences and research capability across multi-sectors (Property, Consumer and Small/Mid cap) in Hong Kong and US markets.

**Working Experiences**

**King Yip Group Limited (Family Office of SHKP's Kwok Family)**

***Investment Analyst Sept 2015 – Present***

1. **Portfolio Investment**

* Assisted to operate the family’s HK/China equity portfolio.
* Conducted in-depth fundamental research on Property, Consumer and Small/Mid cap sectors for Hong Kong and Greater China market.
* Provided stock picking and sector investment ideas to portfolio manager.

1. **Internal Consulting**

* Conducted internal consulting and advised on business strategies for Sun Hung Kai Properties’ listed subsidiaries.
* Researched on new investment opportunities on global basis.

**FTMFD Limited**

**(**An investment boutique of Franklin Templeton SinoAm in Hong Kong. Franklin Templeton SinoAm, headquartered in Taiwan, manages funds covering Equity, Fixed income and Fund of Funds with AUM of over US$2 billion.)

***Senior Analyst Mar 2008 – Apr 2015***

* Prepared financial models and performed fundamental analysis on HK & China Property, Consumer and Internet sectors
* Performed in-depth proprietary industry analysis, interacted with industry experts, suppliers, competitors and customers along the supply chain.
* Conducted due diligence by having site visits, attending investment conferences and interviewing with the management teams of listed companies.
* Provided stock and sector investment ideas to senior portfolio managers (for 2 China/HK funds and 1 China-focused global fund).
* Performed credit analysis and provided investment advice on China real estate bonds to portfolio managers.

**CSC Securities (HK) Limited**

***Research Analyst* *Aug 2006 – Feb 2008***

* Initiated in-depth company coverage and built financial models for Hong Kong listed equities, primarily focusing on China Financial and Utility Sector.
* Compiled company, sector research reports and morning notes.
* Built and maintained industry databases.
* Organized field trips and conducted site visits.
* Generated investment ideas for proprietary trading teams and presented investment ideas to institutional clients.

**Professional Qualifications**

**2013 Chartered Financial Analyst (CFA)**

**Education**

**2003 - 2006 The Chinese University of Hong Kong**

Integrated Bachelor of Business Administration – Finance

**Skill Sets**

**Financial Analytics:** Bloomberg, DataStream, CEIC, Capital IQ and Wind

**Languages:** Native in Mandarin, fluent in Cantonese and English

**Reference**

Available on request