

# KEFONG LEE

Tel: 852-9350-3631 kefonglee@gmail.com

6D Verdant Court, Peninsula village, Discovery Bay, HK

- 1.) Advised hedge fund & HNW on JP and HK equity
- 2.) Managed discretionary account of High Net Worth with 20% return
- 3.) Conducted over 100 meetings with companies of JP and HK
- 4.) Fluent in English, Japanese, and Mandarin, CFA II candidate

## **JAPAN & TAIWAN DIRECTOR**

HK, China

*TIM Group*

2015 Feb — 2015 Oct

- Advised funds to construct alpha capture program to enhance fund performance
- Acquired Japan & Taiwan institutional clients onto alpha capture platform

## **HONG KONG & JAPANESE A.MANAGER**

HK, China

*Okasan International – Sales Department*

2011 — 2014Sept

- Discretionary acct returned 20% for each 2012 & 2013, with 20 month of positive return
- Conducted over 100 interviews with executives and IRs of Japan, HK, and Asian companies.
- Advised high-net-worth & institutional clients on HK and JP equity strategies & ideas

## **PROPRIETARY / STOCKLOAN TRADING**

Tokyo, Japan

*Mizuho Securities – Equity Department*

2007 — 2011

- Supported senior trader on analysis and execution of quantitative strategies
- Performed stock lending to hedge funds, asset management funds, and prime brokers

## **FINANCIAL INSTITUTION RELATION MANAGER**

Tokyo, Japan

*HSBC – Corporate, Investment Bank, and Markets Department*

2006 — 2007

- Promoted banking products to global financial institutions and asset management

## **PRODUCT MANAGER/CLIENT SERVICE**

Tokyo, Japan

*SPARX Asset Management – Product Management Division*

2004 — 2005

- Represented fund managers to explain on performance to clients & prospects
- Updated fund marketing materials and replied to inquiries from clients

## **EDUCATION & SKILLS**

### **NEW YORK UNIVERSITY**

New York, NY

### **STERN GRADUATE SCHOOL OF BUSINESS**

*MS in Statistics, Completed one year toward degree. 2001*

- Concentration in Financial Engineering.

### **WASHINGTON UNIVERSITY in ST. LOUIS**

St. Louis, MO

*BA, May 1999.*

- Major: Economics
- Academic Honors: Dean's List, College Honors

## **LANGUAGE**

- English & Japanese fluent, Mandarin nearly fluent
- CFA Level 1 passed, Bloomberg, VBA, Access