

Name

Phone number | [email](#)

EDUCATION

University

Bachelor of Degree

Location

Sep 2021 – Jul 2024

University

Bachelor of Degree

Location

Aug 2020 – Mar 2021

- Cumulative GPA: 3.6/4.0
- Awarded Best All-Round Strategic Management Student of 2020 by Dr. Name

WORK EXPERIENCE

Equity Research Company

Equity Research Intern

Location

Apr 2021 – May 2021

- Generated investment recommendations and price targets on Chinese internet and EV companies from conducting financial valuations and research on competitive advantages and KPI's, market trends and geopolitical developments
- Updated models, visualization charts, and recommendations in reports upon market events and financial filings
- Recommended a long position on Geely (SEHK:0175) which realized its estimated 38% upside one month after the initiation – the 'outperform' view was based on a DCF valuation and comparable companies analysis

Merchandise Trading Company

Sales Representative

Location

May 2020 – Aug 2020

- Responsible for sales processes such as communicating with clients and liaising with managers; negotiating deal terms, delivering price quotations and proforma invoices; and helping clients submit tenders to global retail corporations
- Contributed USD \$250,000 to revenues from completing 7 transactions and improved firm's lead-conversion rate
- Increased monthly search appearances and enquiries on the e-commerce platform by 23% and 8% from improving search engine optimization – reassigned priority items based on popularity of comparable products from competitor

AIA Insurance and Financial Services

Wealth Management Intern

Location

Jan 2020 – Feb 2020

- Supported in constructing financial plans according to client's income, risk appetite, and savings & investment needs
- Conducted and presented research internally on APAC region's insurance boom from digitalization and deregulation of the industry, and socio-economic trends like the increase in disposable income of the growing middle class

LEADERSHIP EXPERIENCE

Ex-University Business Club

President

Location

Sep 2020 – Jan 2021

- Worked towards strengthening job market awareness, network, and employability of students in business school
- Hosted networking events inviting alumni working in marketing, consulting, and banking to share work experiences
- Initiated over 200 students to participate in 30 different events, information sessions, and case competitions either hosted or sponsored by companies across the financial industry and non-governmental organizations

EXTRACURRICULARS

Credit Suisse Stock Pitch Challenge – semi-finalist

Mar 2021

- Pitched a buy recommendation for Dollar General (DG) at \$194.1 with a target price of \$229.4 based on the pending fiscal stimulus as a driver for U.S. retail sales and 'undervalued' indication from comparable companies analysis
- DG trading at \$233.7 per share as of 25 August 2021, 6 months after the initiation at a 52-week all time high

Lazard Case Study Session

Nov 2020

- Participate in a session hosted by the Capital advisory team to learn about secondary market fund raising processes
- Followed Idinvest's GP-led secondary deal of restructuring funds into a tech-focused special-purpose vehicle

ADDITIONAL INFORMATION

Skills: Capital IQ, fluent in Mandarin, conversational proficiency in Cantonese

Modeling: DCF valuation, comparable company analysis, sensitivity and scenario analysis

Interests: Touch rugby, cross country & marathon running

Certifications & Affiliations: 2021/22 SEO Candidate, Financial Modeling & Valuation Analyst (CFI)