



Education

Bachelor of Commerce (Finance) at University of Western Australia GPA 3.8

Related experiences

2 years of experience in equity markets managing money from family and friends while in University

- Investment focus on greater China listed equities
- Performed equity screening using specified financial criteria
- Conduct due diligence on companies using publicly available information as well as conduct private investigations on firms of interest
- Designed comprehensive financial valuation models to support investment decisions
- Consistently generated actionable investment ideas with a focus on well-established companies within their respective specialties.
- Developed business relationships with high net-worth individuals and successfully communicated investment ideas with positive results
- Positive return of 72% since inception on capital committed

Junior stockbroker at Atlantic Pacific Securities

- Established client relationships, successfully opened 16 accounts in the first 2 months

Intern at China BlueSky Ventures

- Conducted research on China's agricultural industry and met with clients to discuss business potentials

Professional capabilities

- Ability to write and communicate research in concise manner
- Excellent financial modeling and analytical skills
- Ability to work under pressure and meet deadlines
- Proficient in the use of Word, Excel, PowerPoint and Bloomberg
- Proficient in both English and Chinese (Mandarin)

Personal Interests

- Basketball (Played in high school team)
- Saxophone (level 6 achieved in high school, played in University band)

Related Qualification and Certifications

- CFA level 2 passed (9 subjects in the >70% range)
- CFA level 1 passed (9 subjects in the >70% range)
- Both levels passed on first attempt

Referee



