

Name

Phone | [email](#)

EDUCATION

[School]

Bachelor of Science in Accounting and Finance

Location

Time Frame

- Completed 3 semesters with cumulative GPA: 3.57/4.0
- Awarded Best All-Round Strategic Management Student of 2020 by Dr. Name

WORK EXPERIENCE

Equity Research Shop

Location

Equity Research Intern

April 2021 – May 2021

- Generated investment recommendations and price targets on Chinese internet and EV companies based on financial valuations supported by research on industry sector trends, and geopolitical and market developments
- Recommended a long position on \$11b revenue company NetEase (NTES) with 18% upside and short on \$530mm net loss company Bilibili (BILI) with 15% downside based on fundamentals and comp analyses, and DCF valuations
- Updated models, visualization charts, and recommendations in reports upon market events and quarterly earnings

AIA Insurance and Financial Services

Location

Wealth Management Intern

Jan 2020 – Feb 2020

- Supported in analysing and constructing financial plans based on client's income, risk, and savings & investment needs
- Gained insights on Asia-Pacific's insurance boom based on digitalization, deregulation, and socio-demographic trends

LEADERSHIP EXPERIENCE

[School] University Business Club

Location

President

Aug 2020 – Mar 2021

- Worked towards strengthening job market awareness, network, and employability of students in business school
- Updated job postings and events from companies across the financial industry, and organized case competitions
- Invited alumni speakers working in marketing, auditing, risk, and investment banking to share work experiences

EXTRACURRICULARS

[Bank] Stock Pitch Challenge – semi-finalist

March 2021

- Pitched a buy recommendation for Dollar General (DG) at \$194.10 with a target price of \$229.38 based on pending fiscal stimulus and U.S. retail sale forecasts; and trading multiples and 10-K release to consolidate an undervalued price
- DG peaked at \$220.20 in a 2-month horizon and fulfilled 95% of the potential upside derived from the DCF valuation

Citi Virtual Experience Program with Forage

Dec 2020

- Conducted benchmarking for transaction and trading comps analysis, and DCF valuation for an M&A transaction
- Produced investment teaser summarizing industry/company overview, valuations summary, and investment rationale

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

Hosting company – semi-finalist

Feb 2020

- Pitched a B2B automated digital payment services solution to improve corporate expense reimbursement systems
- Introduced a reimbursement infrastructure allowing employers to track expense behaviours and validate expenses
- Provided a solution to address fraudulent reimbursement and improve operations expense management in businesses

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 and marathon running
Certifications & Affiliations: 2021 SEO London Candidate, Financial Modeling & Valuation Analyst (CFI)