

Bob Smith

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RELEVANT EXPERIENCE

Boutique Investment Bank

Shanghai

IBD Analyst

August 2013 - September 2013

- Worked on both sell side and buy side M&A deals with specialty in industrials; prepared valuation analyses, merger models and client presentations
- Responsible for drafting a business strategy and writing an in-depth research report for the sell-side business BIB is setting up
- Transaction Experience:
 - Potential \$7 million sale of plastics manufacturing company in Greater Shanghai Region
 - Met with clients and prepared pitch-books and presentations for potential sale
 - Chinese industrial company's \$10 million acquisition of Israeli laser manufacturer

KPMG Corporate Finance

Hong Kong

Summer Analyst

June 2010 - September 2010

- Built extensive financial models for projections, sensitivity analysis and valuation
- Spread public comparables, calculated relevant multiples and valuation range of industry competitors
- Engagements included:
 - Basic materials company's \$15 million potential acquisition of commodity subsidiary in Jamaica
 - Valuation of technology company in Vietnam
 - Provided expertise for the audit of an American financial services firm

EDUCATION

Tsinghua University

Beijing, China

School of Economics and Management; Language exchange

2012 - 201

- Senior member of the International Business Club, English Debate team, THU Tennis team
- Selected coursework: Intermediate Financial Accounting, Financial Statements Analysis

University of British Columbia

Vancouver, BC

Bachelor of Commerce Major in Accounting; Minor in Philosophy

2009 - Present

- Major GPA: 83%
- UBC Presidential Scholar
- Active member of UBC Finance Club and the UBC Tennis team

CERTIFICATIONS & AWARDS

- Passed CFA Level I on first attempt
- 2010 BC Stock Competition: Came 2nd out of approximately 200 teams participating. Won cash prize of \$500.00

PERSONAL PROJECTS

Independent Stock Trading

Vancouver, BC

Portfolio Manager

April 2009 - Present

- Managed a portfolio comprised of capital from both clients and own savings using a value oriented strategy
- Performed extensive research on numerous companies (e.g. 10-K's, 10-Q's and analyst reports) and built models to determine intrinsic value of company
- Long only strategy focusing on mispricing of a company's stock created by special situations; no leverage used
- Holdings included:
 - NOK bought at \$2.80: mispricing due to negative perception of stock in the market; sold at \$5.60
 - EPAX bought at \$4.20: turn-around play; catalyst for purchase was the recent takeover of board by activist shareholders and a large discount in price after weak Q4 earnings release due to seasonal factors
- Sharpe ratio of 1.35 for 2011

SKILLS

- Fluency in Cantonese and Chinese (Mandarin); elementary proficiency with Japanese and French
- Experience with Microsoft Excel, Word, PowerPoint, Adobe Photoshop, Bloomberg and CapitalIQ