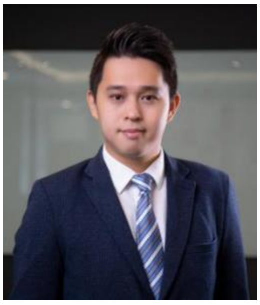

**Jerry Lee Chee Yeong, CFA**
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# Profile

With over 7 years of experience as a Portfolio Manager at iFAST Capital Sdn Bhd, recently promoted to Assistant Director of Portfolio Management, I've successfully overseen discretionary portfolios and private mandate portfolios valued at over RM600 million. My expertise extends to both (conventional & Islamic) portfolios tailored for the mass public and private mandate portfolios designed for esteemed high net worth clients. I take pride in providing strategic guidance and investment advice that consistently optimizes portfolio performance and aligns with client objectives. In addition to my role in portfolio management, I am a regular contributor to various media, where my insights and market perspectives are highly sought after. I have been featured on prominent platforms such as 8TV, BFM Caijin, China Press, Sinchew Daily, and others. My academic achievements include graduating with First-Class Honors in Bachelor of Finance and Investment. Furthermore, I am a Chartered Financial Analyst (CFA) Charterholder and have completed the Certified Financial Planner (CFP) program, further solidifying my expertise in the field of finance and investment.

# Work Experience

**iFAST Corporation Ltd**
**(Assistant Director, Portfolio Management – (March 2024 – Current))**
**(Portfolio Manager - (Jan 2021 – Feb 2024))**
**(Assistant Portfolio Manager - (Jan 2020 – Dec 2020))**
**(Senior Portfolio Analyst, Portfolio Management - (Jan 2019 - Dec 2019))**

- A CMSRL license holder for fund management activity in relation to portfolio management.
- Manage client investment portfolio (discretionary managed portfolio) with total AUM of over RM600 million.
- Taking an active role to assist the expansion of Digital Transactional Banking Segment for iFAST Global Bank in UK.
- Spearhead the digital bank license application in Malaysia in 2021.
- Play a pivotal role in project management, spearheading initiatives aimed at system enhancement and revamp
- Responsible for marketing the managed portfolios to both B2B and B2C clients.
- Provide training and market & portfolio updates to IFAs and retail clients on regular basis.
- Contribute articles and comments to media, magazine and newspaper
- Analyse macroeconomics of countries & write articles on market updates and investment ideas.

**iFAST Corporation Ltd**
**(Research Analyst) (Jan 2017 – Dec 2018)**

- Conduct presentations to financial advisors and clients on house views, market updates and investor knowledge.
- Perform analysis and due diligence on unit trusts using quantitative and qualitative measures.

- Analyse macroeconomics of countries; responsible for coverage of Malaysia and Japan.
- Write articles on market updates, investment ideas and fund analysis for website, magazine and media.
- Contribute articles and comments to media, magazine and newspaper (New Straits Time, Focus Malaysia, SinChew, Smart Investor and The Malaysian Reserve, 4E Journal and others) on a regular basis.
- Involve in managing the discretionary managed portfolio.
- Involve in setting up new project (Islamic Portfolio)

**Affin Hwang Capital Asset Management Berhad**
**(Treasury Dealer) (Dec 2015 – Dec 2016)**

I was managing the money market placement for funds with size of over billions of Ringgit Malaysia during my employment with Affin Hwang Asset Management. In fact, my daily job scope including:

- Money Market Dealing.
- Communicate and negotiate with bankers to obtain best money market rate.
- Research and analyze interest rate to achieve best return for money market fund.
- Cash flow analysis, projection and management.
- Foreign Currency Dealing.

**SMJK Chong Hwa**
**(Part-time Teacher) (Sept – Nov 2015)**

- Part-time teacher at SMJK Chong Hwa for several subjects (Chinese, English, Maths & Moral)

**Ken Holdings Berhad**
**(Credit controller) (Jan – April 2015)**

My job scope included:

- Communicate with clients to ensure they had all the necessary information on GST.
- Prepare monthly accounts for management meetings (consistently meeting deadlines).
- Handle a range of other clerical tasks (e.g. data entry, filing, billing and contacting clients)

# Education/Qualifications

**Noesis Ex Ed** **(2015-2017)**

- ➢ Passed all three levels of the CFA Program on the first attempt.

**Tunku Abdul Rahman University College** **(2011-2015)**

- ➢ Graduated in Bachelor of Business, majoring in Finance and Investment.
- ➢ CGPA: 3.87 out of 4 and won book prize in 2015.
- ➢ Won 1st Prize in 2nd MFPC National Financial Planning Tournament 2014.
- ➢ Represented College at Inter Campus Business Challenge (ICBC) 2014 organized by Bursa Young Investor Club.
- ➢ Awarded Diploma with CGPA 3.95 out of 4 and won book prize in 2013.

**Certified Financial Planner (CFP)** **(Dec 2013）**

- ➢ Completed the course to qualify as (CFP) in December 2013.
- ➢ Currently Associate Member of Financial Planning Association of Malaysia (pending required work experience)

# Interests

- ▪ Travel, to broaden my life exposure and gain experience through understanding the culture of different countries.
- ▪ Trade stocks listed on Bursa Malaysia.