

# HEEWON LEE

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**SUMMARY: Professional Financial Analyst** with 2 years of experience in a global investment firm. Proven ability in formulating key investment strategy and analyzing financial indicators. Known for displaying high ethical standards, integrity, and ownership while always exceeding expectations. Good communication skills with fluency in English and Korean. A strategic thinker, problem solver, fast learner, and cross-functional collaborator with strong analytical mindsets.

## EDUCATION

### UNIVERSITY OF CALIFORNIA, BERKELEY

(Expected) Master of **Information and Data Science** (Online)

**Berkeley, CA, USA**

May 2024 – May 2025

### UNIVERSITY OF VIRGINIA

Bachelor of **Economics** (GPA: 3.5/4.0) | Bachelor of **Statistics** (GPA: 4.0/4.0)

**Charlottesville, VA, USA**

Aug 2018 – May 2022

### DANA HALL SCHOOL

High School Diploma

**Wellesley, MA, USA**

Aug 2015 – Jun 2018

## WORK EXPERIENCE

### MIRAE ASSET GLOBAL INVESTMENTS CO., LTD

**Seoul, Korea**

*Analyst* | *Multi-Asset Research Division* | *AI Financial Engineering Dept.*

July 2022 – Present

- **Investment Strategy, Global Multi-Asset & Asset Allocation**
  - Carried out the development and implementation of asset allocation strategies through the application of quantitative techniques, specifically focusing on Cross Asset Strategy to design optimal investment tactics across various assets
  - Provided daily performance updates and reporting for the team's Target Date Funds (TDF) Glide Paths to ensure that the TDF glide paths were meeting their performance objectives in alignment with the specified target retirement dates
  - Involved in developing strategic asset allocation plans for a multi-asset allocation funds under the AUM of USD 700M in alignment with the strategic investment strategies, risk management compliance, and portfolio allocation guidelines
    - Contributed to achieve a **YoY average return of over 10%** compared to competitors and surpassed internal KPIs for Asset Allocation Target Date Funds (TDF) for multiple periods; incorporated AI-related stocks into the fund as a hedge against volatility of escalating economic uncertainty and AI-disruption, followed by period rebalancing
    - Adjusted the relative proportions of multi-assets based on the fund's maturity date, aiming to increase equity allocation for pension funds with longer glide paths to potentially achieve higher returns and shifting toward bonds with shorter glide paths to prioritize safety in asset allocation
- **Financial Valuation, Fundamental Analysis & Due Diligence**
  - Performed a comprehensive analysis of the performance of constituent companies within an Exchange-Traded Fund (ETF) by focusing on financial statement evaluation for valuation purposes and providing valuable insights
  - Collected, compiled, and analyzed financial data to investigate the impact of these constituent companies on the ETF's performance relative to its benchmark index, contributing to its use for the monthly rebalancing committee meetings
  - Undertook analysis on the specifics of each company's performance and market dynamics and analyzed companies' revenue segments, competitiveness, market capitalization, multiples, analyst consensus, and financial indicators
- **Market Monitoring, Market Commentary & Industry Research**
  - Gathered and analyzed a wide range of market data, including asset class performances, key economic indicators, sector-specific trends, and geopolitical influences for monthly market summaries and commentaries for internal and clients
  - Prepared and presented daily market updates along with asset class-specific trends including equities, bonds, alternatives, and currencies; organized and delivered market trend data categorized by styles such as growth and defensive stocks
  - Executed industry-specific trend analyses, focusing on distinctive stock movements within each sector through a bottom-up research methodology, involving a comprehensive examination of individual companies within the respective sector
- **Performance Analysis, Business Report & Documentation**
  - Conducted daily and weekly market insights and reports by categorizing them based on Fundamentals (Economic Indicators, Individual Company News), Macroeconomic Trends, Liquidity (Fund Flows, MMF, M2/GDP), and Politics through summarization and presentation using a top-down approach
  - Drafted monthly performance reports for 8 Funds and documents for asset allocation ratio adjustment to provide a comprehensive overview of the performance of each fund over the course of a month, encompassing key financial metrics
  - Prepared annual fund performance reports and market reports and drafted the fund investment management reports for around 8 funds and created performance reporting materials to provide insights to stakeholders, investors, other parties

## CERTIFICATE & SKILL

• **Certified Investment Manager** | Korea Financial Investment Association (KOFIA) (Dec 2022)

• Language | Korean (Native), English (Fluent: TOEIC 960/990)

• IT | Microsoft Office Suite, Bloomberg, Factset