

Elizabeth Yong

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EDUCATION

Current CFA Level I Candidate

Aug 2026

University of Melbourne - Bachelor of Commerce, Majoring in Accounting & Finance

Parkville, VIC

- Grade: 77 WAM, Upper Second Class Honours

2024 - Present

WORK EXPERIENCE

Investment Vacationer

Singapore

Lumen Capital Investors

Nov 2025 –

- › Conducted fundamental equity research across a ~20 stock coverage universe spanning global markets, building comparable company analyses (comps) and identifying key valuation drivers, catalysts, upside, and downside risks to support portfolio positioning decisions.
- › Synthesised 40+ daily market intelligence across equities, fixed income, and macro to produce investment briefs directly sent to senior managers and clients.
- › Formulated investment recommendations on selected securities using Bloomberg Terminal, combining bottom-up fundamental analysis with top-down macro views to inform portfolio manager decision making.

Mar 2026

Key skills: Bloomberg Terminal, Equity Research, Portfolio Management

Management Consultant Vacationer

Dec 2024 –

PricewaterhouseCoopers SEAC Consulting – Finance Transformation GTM

Mar 2025

- › Supported end-to-end delivery across 2 priority client engagements in the property and healthcare sectors, contributing to finance transformation workstreams through process mapping, client workshops, and preparation of client-facing deliverables
- › Analysed financial planning and reporting data across 3 workstreams, identifying inefficiencies in enterprise performance management (EPM) systems and providing recommendations
- › Authored content sections for 6+ regional proposal decks across Southeast Asia with a combined pipeline value of \$1M+ in potential consulting engagements.

Key skills: Microsoft PowerPoint, Project Management, EPM systems, Problem Solving

Accounting Assistant

Budgets Accountants Pte Ltd

2024

- › Managed monthly financial reporting and reconciliations for 8+ SME clients, ensuring 100% compliance with accounting standards.
- › Processed and reconciled 200+ financial transactions per month using Xero and Excel.

Key skills: XBRL, Xero, Microsoft Excel

LEADERSHIP EXPERIENCE

Co-President

Parkville, VIC

Banking on Women

2024 - Present

University-based women premier financial society

- › Direct strategy and operations across 7 portfolios and a 30+ member executive team, overseeing budget allocation, recruiting, and cross-portfolio coordination to advance BOW's mission of empowering women in finance.
- › Drove end-to-end sponsorship pipeline, from cold outreach and deal negotiation to ongoing relationship management, securing \$20K–\$30K in corporate partnerships with financial services firms to fund BOW's programming and operations.
- › Enhanced member engagement, delivering events reaching 800+ students and scaling BOW's digital presence to 6,500+ followers with a 45% increase in engagement.

Key skills: Strategic Leadership, Stakeholder Engagement, Cross-functional Coordination

Events Director - *Accounting Students Association*

2024 - 2025

University Peer Mentor – *Orientation*

2025

Events Officer - *Quantitative Trading Society*

2026 – Present

ADDITIONAL SKILLS

Languages: Fluent in English, Conversational Proficiency in Mandarin

Volunteering: Melbourne Symphonic Orchestra Chorus Member, Dementia Foundation Australia

Interest: Music (Classically Trained Singer, Producing, Composing), Computing (Python, C)

Public equities investing: Currently following AI infrastructure, semiconductor supply chains, Oil