CHUA WEI LUN

LINKEDIN



INTERVIEW DONE BY AMANDA LECK

Wei Lun presently holds the role of a Client Relations Associate at GMO in Singapore, and previously served as an Investment Consulting Analyst at Credit Suisse. His career path has been highlighted by over a year of invaluable experience in the finance sector, commencing with diverse internships in business development, corporate finance, and capital markets at esteemed organizations like Shopee, PwC Singapore, and OCBC Bank. Additionally, Wei Lun is a recipient of the prestigious Swiss Bank Gold Medal Award, recognizing his exceptional contributions to the field.

WHAT SPARKED YOUR INTEREST IN INVESTMENT CONSULTING AND LED YOU TO PURSUE A CAREER IN THIS FIELD?

During my internship experiences, I predominantly focused on corporate finance and financial markets, as I believed that was the career path I wanted to pursue initially. However, after gaining hands-on experience in these areas, I discovered that they were not aligned with my long-term goals, and I found certain aspects to be quite challenging. Towards the end of my university degree, I had the opportunity to learn about the field of investments, and that experience opened my eyes to a whole new world of possibilities. I found the work to be both fascinating and fulfilling, which made me realize that this was the area I wanted to concentrate on in my career moving forward, which led me to join Credit Suisse as an Investment Consulting Analyst. A year on in my career, I have decided to move to the asset management field given the challenges in the sector and company which led me to doing client relations in GMO.

PLEASE DESCRIBE A DAY IN YOUR LIFE AT YOUR JOB. WHAT ARE THE SCOPES OF YOUR JOB?

My job as an investment consulting analyst can be quite unpredictable as we primarily deal with handling client queries. Portfolio allocation is a significant aspect of our role, and we work on developing proposals for clients while constantly assessing the market climate and adjusting their portfolios accordingly. As analysts, we are also responsible for supporting our teams and preparing for meetings, which involves consolidating various files and information in a timely and efficient manner. The nature of client queries is vast, and they can often ask about a broad range of topics. We have encountered instances where clients express concerns about potential negative news affecting their portfolios, and our role is to assist them in navigating these uncertainties. However, we are given ample time to work on these queries, and we approach each one with the utmost care and attention. Overall, our role as analysts require us to be adaptable and flexible in responding to a wide range of client needs, which can make it both challenging and rewarding.

WHAT ARE SOME HIGHLIGHTS AND CHALLENGES THAT YOU FACE IN YOUR JOB?

Working closely with higher management has been one of the most rewarding aspects of my job. Our team is relatively small, which allows me to work directly with my team leader on a regular basis. This arrangement has afforded me numerous opportunities for learning and personal growth, as I am constantly exposed to new ideas and perspectives. My team leader is particularly supportive and nurturing, which has enabled me to gain valuable insights into his decision-making processes, helping me develop my career trajectory.

That being said, one of the challenges I have faced in this role would be the steep learning curve. Initially, it was challenging to present my work effectively to clients and to ensure that I was on the same page as my team members. However, over time, I have been able to overcome these hurdles. Ultimately, the learning curve has been a valuable experience, as it has helped me develop the skills necessary to succeed in this role.

WHAT INTERESTS YOU ABOUT THE SECTOR? WHAT ARE SOME KEY TRENDS AND DEVELOPMENTS IN THIS SECTOR/INDUSTRY?

For me, this role is exciting as I have a strong interest in analysing stocks and investments. It has always been a passion of mine to learn about different assets and the market conditions that drive their performance, and this job allows me to do just that. One of the things I enjoy most about this role is the opportunity to work on portfolio management and learn about different strategies for optimizing investment performance.

The advanced portfolio management module at NUS has been particularly useful in helping me develop my skills in this area.

A key trend that is upcoming would be robo-advisors. I recognize that this has become a competitive space in recent years, but I believe that our target clients are different. While some investors may be satisfied with low-cost and convenient automated portfolio advice, many high-net-worth clients prefer to have in-depth consultations with a human advisor. I believe that this is where our team really makes a difference, by providing personalized advice and insights to clients based on their unique needs and goals.

WHAT ARE SOME KEY TRAITS THAT ARE IMPORTANT FOR THIS ROLE?

In my opinion, one of the most crucial attributes for success in any job is a willingness to learn. While the skills and knowledge gained in school provide a solid foundation, it is important to recognize that a full-time job may require additional learning and development. This is particularly true in roles that deal with markets, where new trends and developments can arise at any time. Being able to stay abreast of the latest developments in the market and to understand the actions taken by others is critical to success in this field. This enables us to adjust our thinking and strategies to remain competitive and relevant. As such, a commitment to ongoing learning and development is an essential part of our day-to-day work.

HOW WAS YOUR CAMPUS LIFE AND HOW DID IT PREPARE YOU FOR YOUR WORK NOW? (CCA, PROJECTS, CURRICULUM, INTERNSHIPS OR OTHERS)

It was my circle of friends who truly enriched my university life. Their diverse interests and experiences in different companies enabled me to explore my own passions and interests, and to better understand what I wanted and did not want in my own life.

This process of self-exploration and discovery is one of the most important aspects of the university experience. While many students enter university with a clear idea of their goals and aspirations, it is often the process of figuring out what truly matters to us that proves most valuable. As such, I believe that students should focus less on the final outcome and more on the journey itself, embracing new experiences and opportunities as they arise. Ultimately, it is through this process of exploration and discovery that we can grow and develop as individuals, both during our time in university and post-university.

WHAT SKILLS AND PROGRAMMES DO YOU THINK WILL HELP CURRENT NUS BUSINESS STUDENTS HOPING TO FOLLOW IN YOUR FOOTSTEPS?

Looking back on my time in university, I would have joined NUS Investment Society. The club has a strong reputation for producing talented individuals with valuable technical skills, many of whom have gone on to work for prestigious companies in the finance industry. In addition, I had the opportunity to participate in several case competitions during my time on campus, and I found these experiences to be quite helpful.

Participating in case competitions forced me to think on my feet and break down complex problems into manageable pieces within a short period of time. Over time, I learned how to approach these challenges more effectively, and I believe that this experience has helped me to develop my analytical and problem-solving skills in my current job to a certain extent.

That being said, I must acknowledge that these competitions can be quite competitive, and success is far from guaranteed. Nonetheless, I believe that the skills and experiences that one can gain from participating in such activities make them well worth the effort.

WHAT IS ONE PIECE OF ADVICE THAT YOU WOULD GIVE TO FRESH GRADUATES LOOKING TO PURSUE A CAREER IN INVESTMENT CONSULTING?

To excel in this field, it is important to start early and stay updated with the latest news and market trends. A proactive approach in subscribing to news sources like Bloomberg and understanding various market factors can provide a strong foundation for this role in the future. As the job involves dealing with constantly incoming news and close monitoring of the market climate, having a good understanding of various portfolio aspects and investment opportunities is crucial. By staying well-informed, one can start off on the right foot and have a solid start to their career in this field.

HOW DO YOU BALANCE THE NEEDS OF MULTIPLE CLIENTS WITH DIFFERENT INVESTMENT OBJECTIVES AND RISK TOLERANCES?

Investment strategies depend on the risk profile of the clients. Some clients lean towards high-risk stocks, whereas moderate clients usually invest in diversified and actively managed funds. The best investment approach also depends on the market conditions and the firm's view for the year. Finding a suitable investment solution for clients with different risk profiles can be challenging as there is no one-size-fits-all solution.