



BLUE EAGLE
INSIGHT ADVISORS

*ENLIGHTENING YOUR PATH TO
FINANCIAL INSIGHT...*

Contact us at: sales@beagleadvisors.com
Website: www.beagleadvisors.com



BLUE EAGLE
INSIGHT ADVISORS

EDUCATOR BIOGRAPHY – KIET THE TRUONG, CFA, CAIA

- 15 years of asset management, investment banking, and private equity experience.
- Co-founder of Blue Eagle Insight Advisors.
- Founder and Managing Director/CIO of VietBridge Capital, a hedge fund.
- Research Analyst at Morgan Stanley (NY and HK) covering Telecom sector.
- Head of Execution at Andaman Capital (Thailand), private equity real estate fund.
- Investment Officer at IFC, private equity investments in SMEs.
- Director at Indochina Capital, first real estate fund in Vietnam.
- Vietnamese, Cantonese, Mandarin speaker.
- Bachelor from Columbia University; Master from Harvard University.



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EDUCATOR BIOGRAPHY – STEVEN Y. GEE, CFA

- 20 years of investment and equity experience.
- Co-founder of Blue Eagle Insight Advisors.
- CEO, Red Cat Limited, a financial education and investment research company.
- Author of “Take Charge of Your Investments” and “Warren Buffett’s Secrets to Success”.
- Executive Director at Goldman Sachs (HK and Taiwan) covering Technology companies.
- Research Analyst at Morgan Stanley (HK and Taiwan) covering Technology companies.
- Research Analyst at J.P. Morgan (New York and HK) covering Autos and Airlines.
- Mandarin speaker.
- B.S (Electrical Engineering)/B.A. (International Relations) from Brown University



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FINANCIAL TRAINING CAPABILITIES: FINANCIAL ANALYSIS AND VALUATION

- How to read and understand financial reports.
- How to read, understand and analyze financial statements.
- Financial ratio analysis (key financial indicators of company health).
- Detailed financial modeling/forecasting.
- Discounted cash flow valuation.
- Valuation: ratio analysis, yield analysis and expected value.
- Valuation: comparable company analysis.
- Merger, acquisitions, LBO and other transactions modeling.



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FINANCIAL TRAINING CAPABILITIES: MACRO-ECONOMY, INDUSTRY AND COMPANY ANALYSES

- How to understand and evaluate macro-economic indicators and terminology.
- Drivers of the macro-economy and country-level analysis.
- Comparative industry analysis and evaluating an industry's investment potential.
- Specific industry analysis: technology, telecoms, banks, autos, insurance, telecom equipment, utilities, consumer, real estate, commodities.
- Due diligence and company-level analysis.
- How to evaluate a company's investment potential.



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FINANCIAL TRAINING CAPABILITIES: PORTFOLIO MANAGEMENT AND STOCK-PICKING

- Investing vs. speculation.
- Overview of types of investments (i.e. stocks, bonds, commodities, etc.).
- Active vs. passive investing.
- How to evaluate stocks for their investment potential.
- How to evaluate mutual funds and hedge funds for their investment potential.
- Psychology of investing.
- Portfolio management and asset allocation.