WIE Learning Journal

Victory Securities Asset Management Internship



At Victory Securities during my internship

Internship Role Asset Management Intern

This journal records my work, professional development and team experience during an asset management internship at Victory Securities. My main learning was how to connect financial analysis, data governance and real business workflows while developing a more rigorous and responsible professional approach through guidance and repeated validation.

01 Workplace Environment

I worked in a professional, well-organised office environment that supported focused work and effective communication among team members. Within the asset management team at Victory Securities, colleagues worked closely together and were willing to share their experience, answer questions and provide feedback. Although the working pace was relatively fast, the atmosphere remained supportive and collaborative, which helped me adapt to the workplace and gradually become more confident in handling my responsibilities.

The team placed strong emphasis on accuracy, confidentiality and risk awareness. Tasks involving holdings, transactions, cash balances, net asset value and market information required careful checking because an error in one field or update step could affect subsequent analysis. This environment helped me develop a more disciplined approach to data handling. I learned to clarify business requirements, confirm data definitions, document important processes and verify results before presenting or using them.

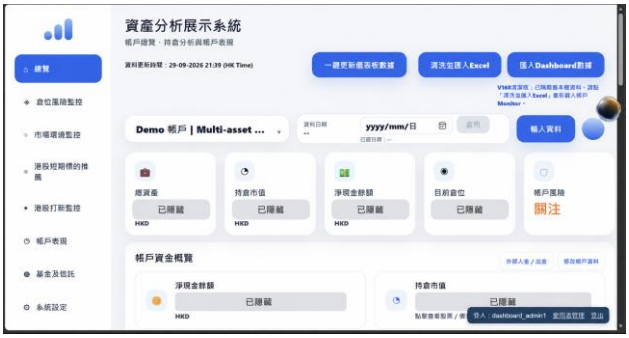


Reviewing and validating research and data materials

02 The Asset Analysis System I Built

During the internship, I built the asset analysis dashboard shown below to integrate multi-account asset and portfolio information. It brings account overview, position risk monitoring, market environment monitoring, short-term Hong Kong stock screening, IPO monitoring, account performance, and fund and trust information into a single interface so that different analytical tasks can use a consistent data structure.

The system supports the organisation and display of holdings, transactions, NAV, cash, risk and performance information, together with workflows for data updates, Excel cleaning and dashboard imports. During development, I focused not only on interface functions but also on reconciliation across holdings, transactions, cash and NAV and on appropriate viewing and editing permissions for different users.



The asset analysis dashboard I built during the internship. Account values, holdings market value, cash balance and position ratio have been redacted for confidentiality.

03 Daily Job Duties

Workstream	Responsibilities and Practice
Multi-account portfolio analysis	Integrated holdings, transactions and NAV information across accounts and supported views by account, asset and time.
Risk and performance analysis	Organised portfolio performance, risk indicators and asset movements and checked outputs against underlying records.
Market sentiment and stock screening	Organised market sentiment information and compared business quality, valuation, liquidity, catalysts and key risks.
IPO information research	Collected information on issuers, offering arrangements, cornerstone investors, use of proceeds, valuation and market conditions.
PostgreSQL data workflows	Standardised tables, fields and update steps and performed statistics, cleaning, exception checks and process documentation.
Reconciliation and access controls	Validated outputs across holdings, transactions, cash and NAV and considered data integrity and permission boundaries.

04 What I Learned and How I Improved

- **From feature thinking to business thinking:** I learned to understand the decision and user need before designing fields, modules and outputs.
- **Greater data discipline:** I moved beyond checking whether code ran and began validating sources, definitions and totals through reconciliation.
- **Stronger research judgement:** In stock and IPO research, I learned to separate facts, assumptions and opinions and to state risks and limitations.
- **Better communication and delivery:** Sharing work in stages, documenting questions and confirming requirements early reduced rework and improved explanations.
- **Confidentiality and compliance awareness:** I developed a stronger understanding of least-privilege access, sensitive-data protection and careful use of internal information.

05 Contribution and Achievement

My main contribution during the internship was participating in the design and development of a multi-account asset analysis and visualisation system. The system brought together previously dispersed information on holdings, transactions, net asset value and market data within a unified analytical framework. Its modules included account overview, holdings analysis, position risk, account performance, market sentiment, Hong Kong stock screening and IPO research, allowing users to review asset allocation, liquidity and risk changes more clearly.

On the data side, I helped standardise the PostgreSQL data structure and update workflow, while carrying out data aggregation, cleaning, reconciliation and import tasks. To improve reliability, I checked the relationships among account balances, market values and transaction records and incorporated appropriate access controls. Functions such as one-click data updates and Excel cleaning and import also made parts of the recurring workflow clearer and more efficient.

I also contributed to research on potential short-term Hong Kong stock opportunities and the organisation of IPO information. This required me to convert large amounts of market information into structured and usable analysis. Although the system can still be improved, completing a functional result that combined financial analysis, data processing and system design was one of the most meaningful achievements of my internship.

06 Mentor Support and Team Collaboration

Throughout the internship, my mentor introduced me to the practical workflow of asset management and provided patient, constructive guidance on my assignments. During the development of the analysis system, my mentor encouraged me to think from the perspective of its users—for example, which information should be displayed first, whether the updating process was convenient and whether risk indicators were sufficiently clear. This helped me understand that an effective financial system requires not only correct calculations and complete functions, but also reliability, readability and alignment with actual business needs.

When I encountered inconsistent data definitions, missing fields or figures that did not reconcile, my mentor and colleagues helped me trace the source of the issue and understand the business meaning behind the data. Their guidance taught me to confirm definitions and assumptions before beginning an analysis or technical implementation. As a result, I became more careful in validating outputs and more confident in identifying and explaining problems.

The team maintained an open and supportive working environment. Colleagues were willing to share their experience, answer questions and listen to my ideas. Our interactions extended beyond daily work through volunteering and weekend activities, which helped me integrate into the team and appreciate how trust, communication and mutual support contribute to effective collaboration.



With my internship mentor at Victory Securities

07 Community Engagement and Team Culture

During the internship, I joined colleagues in volunteering at the Hong Kong Federation of Women's Centres - Jockey Club Lai Kok Centre. We distributed Dragon Boat Festival gifts to elderly residents and spent time speaking with them. The activity showed me how a financial institution can participate in the community through practical action and gave me a direct understanding of patience, respect, clear communication and corporate social responsibility.



Victory Securities volunteer team at Jockey Club Lai Kok Centre



Distributing Dragon Boat Festival gifts to elderly residents

Outside work, I spent time with new colleagues and friends visiting places such as the Hong Kong Palace Museum and the Nanning naval ship. These weekend activities helped me understand more of Hong Kong's culture and city life in a relaxed setting and strengthened mutual trust. Back at work, our communication became more natural and collaboration became smoother.

08 Final Reflection

My internship at Victory Securities gave me a much clearer understanding of the accuracy, risk awareness and sense of responsibility required in financial work. Before the internship, I mainly encountered financial data through coursework and technical exercises. In a real working environment, however, even a seemingly straightforward analysis requires consideration of data sources, business definitions, update efficiency, user permissions and the way results are communicated. Through system development, data cleaning, reconciliation and market research, I learned to view each assignment as part of a complete workflow rather than as an isolated technical task.

The experience also helped me identify areas for further improvement. When working with complex datasets, I need to become faster at determining whether a problem originates from the source data, business rules or system logic. When presenting research findings, I would also like to improve my ability to select the most relevant information and communicate conclusions concisely. Feedback from my mentor and colleagues showed me that professionalism is reflected not only in completing a task, but also in validating the result carefully, communicating potential risks and continuously improving the working method.

My learning was not limited to technical and financial skills. While distributing Dragon Boat Festival gifts to elderly residents at the Hong Kong Federation of Women's Centres – Jockey Club Lai Kok Centre, I saw how employees and financial institutions can contribute to the wider community through practical action. Weekend activities with colleagues, including visiting the Hong Kong Palace Museum and the Nanning naval ship, also helped me build meaningful relationships and develop a broader appreciation of Hong Kong's society and culture.

Overall, the internship enabled me to connect my knowledge of finance with data analysis and system development in a practical setting. It also gave me a clearer sense of the direction in which I would like to develop. I will carry forward the habits of careful validation, responsible decision-making and teamwork that I developed during the internship, while continuing to strengthen my capabilities in financial technology and asset management.