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# ASA

# LUMKWANA CA(SA)

## SUMMARY

Asa Lumkwana is an associate at the Public Investment Corporation, the largest asset manager in Africa. She has a passion for investing and the development of sustainable business.

## WORK EXPERIENCE

*2022 – present*  **ASSOCIATE**

Public Investment Corporation | www.pic.gov.za

My primary responsibilities at Public Investment Corporation includes looking after the unlisted investment portfolio. I am responsible for,

- Development and implementation of post investment plan
- Unlocking value in portfolio companies
- Follow on investments and bolt-on strategies for portfolio companies
- Post investment management of the portfolio companies, including monitoring of performance and KPIs
- Designing and implementing exit strategies

*2020 – 2022*  **ASSOCIATE**

Agile Capital | www.agilecapital.coza

- Deal origination activities
- Transaction screening, transaction execution, including business valuation and presentation to investment committee
- Post investment management of the portfolio companies, including monitoring of performance and KPIs
- Board committee participation in portfolio companies with a focus on governance monitoring
- Writing industry Thought Pieces on opportunities and challenges identified in specific industries

*2018 – 2020*  **CREDIT ANALYST**

RMB | [www.rmb.co.za](www.rmb.co.za)

- Financial analysis of companies and providing a long-term credit view based on their current performance.
- Writing and reviewing full credit papers that assess industry and business risk of companies.

## SKILLS

**Strengths Finder 2.0 Top 5 strengths**

Futuristic
Strategic
Ideation
Connectedness
Learner

## EXTRA-MURAL ACTIVITIES

- Published in Accounting SA, Engineering News and TopCo Media Bulletin
- Speaker for the ABASA Women in Leadership Masterclass 2021
- Speaker for Thuthuka Motivational Talk 2022
- Nominated to take part in the RMB Lotus Women Leadership Program 2019
- Member of the Rosebank Toastmasters club (won the 2019 Newcomer's unprepared topic)
- Co- Hosted the RMB Risk Feedback session – 2018
- Hosted a Podcast for Agile Capital
- Plays netball and tennis

- Presentation and debating at credit committee for the approval of deals of up to R4bn.
- Continuously monitoring financial performance of portfolio clients.

**2015 – 2017**  **ARTICLE CLERK**

Deloitte | [www.deloitte.com](http://www.deloitte.com)

- Auditor-in-charge of all five of my clients in my third year of articles.
- Valuation of private companies (a significant risk balance due to the estimates involved).
- Project planning and team management of up to 26 members.
- Risk assessment of organizations in various sectors.
- Reviewed financial statements prepared in accordance with IFRS.

**2016 – 2017**  **CO- FOUNDER OF CONSULTING BUSINESS**

Indalo Consulting

My co-founder and I started the business in 2016 after identifying the endemic need and lack of financial management skills and corporate governance in Small and Medium Enterprise as a key driver of their premature failure. The purpose of the business was to assist clients by placing structures in their businesses as a first step to unlocking systemic growth.

Key Milestones and Responsibilities:

- Kiddies Korner Hair Salon: Crystalized access to market by problem solving the business' value preposition
- Sazi'iAfrica: Drafted business strategy and problem-solved the marketability of their services
- Black Leaf Interior Design: Drawing up of budgets and assistance with development of their finance function.

# EDUCATION & PROFESSIONAL QUALIFICATIONS

**2019**  **CAIA Level I Exam**

Chartered Alternative Investment Analyst

**2017**  **Assessment of Professional Competence (APC)**

South African Institute of Chartered Accountants

**2015**  **Initial Test of Competence (ITC)**

South African Institute of Chartered Accountants

**2014 – 2014**  **Post-Graduate Diploma in Accounting (CTA)**

University of Monash, South Africa

**2010 – 2013**  **BCom: Accounting Sciences**

University of Pretoria, South Africa

**2009**  **National Senior Certificate**

Collegiate Girls High School, South Africa

**References are available on request**