

# Edward Kerr

## EDUCATION

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<b>University of Oxford</b> MSc Financial Economics	<b>Oxford</b> 2017 – 2018
<b>University College London</b> BSc Economics: First Class Honours and Dean's List (top 5%)	<b>London</b> 2014 – 2017
<b>Grammar School at Leeds</b> A2: Mathematics A*, Economics A*, Geography A*	<b>Leeds</b> 2012 – 2014

## WORK EXPERIENCE

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<b>Montagu Private Equity LLP</b> <i>Investment Manager</i>	<b>London</b> Jul-21 – Present
<ul style="list-style-type: none"><li>Member of the UK investment team at a leading mid-market investor with £11Bn AuM, where I am responsible for origination, deal execution and portfolio company support, with a focus on software, data and capital markets technology businesses</li><li>Built differentiated relationships with managers, industry experts and advisers – independently originating numerous opportunities, from several first-time management meetings to an offer being made for a listed company</li><li>Strong commerciality, having evaluated 100s of businesses against our investment criteria and led the commercial, financial, tax and technology due diligence workstreams for 2-3 transactions per year</li><li>Frequent interaction with management teams, having developed a warm and open style for asking probing, well informed and pertinent questions</li><li>Honed technical skills with detailed LBO modelling and financial analysis</li><li>Transaction experience includes the acquisition of Tyber LLC, EPFR, Waystone's acquisition of LFS, Janes' acquisition of RWR, as well as final round bids for EquiLend, Pirum, SAI360 and S&amp;P Engineering Solutions</li><li>Support two companies: ISI Markets and FPL, with regular dialogue on business strategy, valuation, management incentives, budgeting and exit planning, alongside active contribution in monthly board meetings</li><li>Selected to spend six months in New York to help establish our newly opened office, organised a training day in Paris, centralised the management of internal tools/resources and promoted early, on a mid-year cycle</li></ul>	
<b>Morgan Stanley Investment Banking</b> <i>Associate</i>	<b>London</b> Jul-18 – May-21
<ul style="list-style-type: none"><li>Highly ranked Associate in the UK &amp; Ireland Team, promoted after two years as Analyst</li><li>Strong technical skills, inquisitive mindset and experienced in presenting complex analysis clearly to clients</li><li>Valued team member, selected to mentor the new analysts and organise a 'teach-in' series</li><li>Extensive live deal experience, including:<ul style="list-style-type: none"><li>Aston Martin's placing and subsequent rights issue, raising £550m</li><li>Sale of ReAssure to Phoenix Group for £3.2Bn</li><li>IAG's €2.7Bn capital raise</li><li>£1.6Bn IPO of Trainline</li><li>Evaluating Government support for a potential £1.5Bn bailout of Virgin Atlantic</li></ul></li></ul>	
<b>Rothschild Investment Banking</b> <i>Summer Analyst</i>	<b>Leeds</b> Jul-16 – Sep-16
<ul style="list-style-type: none"><li>Company valuation analysis, critically evaluated in the context of operational performance and industry trends</li><li>In-depth research, learning nuances of investigative data collection despite limited reporting, such as piecing together the ownership structure of an overseas network of holding companies</li><li>Met with clients and attended several corporate events that reinforced the importance of relationships</li></ul>	

## SKILLS & INTERESTS

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- Ultra runner (participating in several 80-100km trail races) and triathlons (Ironman 70.3 distance)
- Coached tennis, represented UCL and Queen's College at football and currently learning Krav Maga
- Self-taught the fundamentals of coding and working on a project using Python, JavaScript, SQL, CSS & HTML
- Creative with strong presentation / artistic skills