HAI PHAM

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A financial professional, with completion of CFA and experience in investment banking, has expertise in financial modeling, financial planning & analysis, and data analytics accumulated when managing M&A processes, and providing valuation advice for financial reporting and tax purposes in Technology and Retail industries

EDUCATION

University of Notre Dame, Mendoza College of Business   Notre Dame, IN
Master of Business Administration & Master of Science in Business Analytics (STEM)   May 2021
- Data analytics projects at https://hai-dong-pham.github.io/portfolio

CFA Institute   Charlottesville, VA
Passed Level III CFA Program   August 2016

Foreign Trade University   Vietnam
Bachelor of Science in International Finance   July 2014

SKILLS

- Financial Modeling
- Financial Planning & Analysis
- Data Analytics
- Valuation
- Project Management
- Capital Budgeting
- Quantitative Research
- M&A Analysis

EXPERIENCE

PwC   San Jose, CA
Valuation Senior Associate Intern   July 2020 – August 2020
- Built financial models using discounted cash flow method to estimate and allocate fair value among equity securities for connectivity technology firm, assisting client's CFO in decision making process regarding stock compensation; created three Tableau dashboards from 44 worksheets to visualize output, formulating first template for valuation team
- Performed goodwill impairment assessment by deploying two valuation models in Excel and extracting insights from financial statements to provide advice on financial reporting for $1.2B SaaS company in financial services industry
- Collaborated with two cross-functional teams to analyze 80 past cross-sector M&A transactions with data gathered from various sources in last 10 years for purchase price allocation benchmarking, assisting leading e-commerce firm in tax reporting of $1B+ acquisition of autonomous vehicle company

Ho Chi Minh Securities Corporation   Vietnam
Largest securities brokerage firm in Vietnam, an affiliate of Samsung Securities, offering services to multinational clients
Investment Analyst   2017 - 2018
- Created first-of-its-kind investment research product to satisfy unmet needs of 60,000 individual clients by conducting 22 voice-of-the-customer surveys with 3,000+ responses and synthesizing insights from 70 salesperson interviews
- Led five-member cross-functional team to identify and present untapped investment opportunities with expected annualized return of 30% in conference, convincing 35 foreign funds to invest $1B in Vietnam's stock market
- Developed quantitative model using data analytics and 25 key financial metrics to rank 760 stocks on real-time basis; offered model to clients on subscription basis, generating new and recurring revenue stream making up of 18% of total sales

Auxesia Holdings   Vietnam
Leading boutique investment bank specializing in mergers & acquisitions with offices in Vietnam, Singapore and Switzerland
Investment Banking Associate   2016 - 2017
- Managed $67M sell-side M&A deal between Vietnam's largest wood manufacturer and 16 foreign investors including pitching, valuation and due diligence; negotiated 15% increase in purchase price for seller by uncovering undervalued asset
- Conducted financial forecast for Vietnam's third largest electronics retailer by using expansion rate and sales per square foot approach and collaborating with sales teams, boosting revenue forecasting accuracy from 75% to 91%
- Went beyond own responsibilities to restructure industry research process and simplify templates, improving reporting efficiency by 20% and removing 33% of bias in current qualitative research; presented output to C-level Executives

ACB Securities Company Limited   Vietnam
Trader   2015 - 2016
- Cooperated with 25 investment funds from US, UK, and APAC to execute 70 block trades with total value of $400M
- Invented advanced Excel models to automate internal reporting process, reducing 20 hours/month for six-member team

ACHIEVEMENTS

- Part-time job: CFA Lecturer at FTMSGlobal Academy from 2017 to 2019; coached 380 students for CFA exams with pass rate of 55% - higher than world average of 41%
- Technical skills: Excel (Solver, VBA, @Risk), PowerPoint, SQL, Tableau, R, Python, SAS Enterprise Miner, Capital IQ