JOELLE AU

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SUMMARY

Product & Data Specialist with proven track record of launching Finance Operations products that increase team efficiency and address client needs. Strong technical background and hands-on experience working on billion-dollar M&A transactions as an investment banker. Currently learning web development through Udemy.

Key Highlights:

✓ Built an automated tool to generate weekly newsletters for 200+ clients   ✓ Certified in Web Development (Udemy Course)
✓ Built product connecting Spotify user preferences to NYC concerts   ✓ Magna Cum Laude at NYU Stern

Technical Toolkit:

Languages & Systems: Python, SQL, HTML, CSS, FactSet, Bloomberg Terminal, Thomson ONE
Creative Programs: Adobe Creative Cloud (Photoshop, Illustrator, InDesign), Web Development

PROFESSIONAL EXPERIENCE

MACQUARIE CAPITAL   New York, New York
Investment Banking Analyst, Leveraged Finance   *July 2019 – Current*
Investment Banking Summer Analyst, Leveraged Finance   *June 2018 – August 2018*

Build products and execute strategic financing opportunities for buy-side clients. Create comprehensive financial models, leverage data tools, and perform market research for clients in technology, consumer retail, industrials, and energy.

Select Projects:

Product Development

- Built an automated tracker tool to monitor and analyze the financial impact of COVID-19 on 25+ key client accounts
    - Worked with Managing Directors across multiple industry and product teams to determine key tracker objectives and test prototypes with 5+ user groups, incorporating feedback effectively to create a tool used by Heads of 10+ teams across the bank
    - Identified opportunities to streamline process efficiency and incorporated additional automation to improve tracker refresh rate from weekly to daily, allowing real-time monitoring of client accounts through volatile macroeconomic periods
- Collaborated with senior team to design automated weekly marketing reports to provide market updates to 200+ Infrastructure clients
    - Developed report structure with Senior Leveraged Finance Bankers from the ground up, incorporating input from Infrastructure team to determine crucial areas of client focus and key information requirements
    - Redesigned inefficient data backups, reducing errors and decreasing report generation lead time from 12 hours to 1 hour
    - Continuously integrated client feedback and financial market analysis to improve/add various report features
- Spearheaded dialogue with 40+ potential debt investors as part of a Macquarie-led debt product offering
    - Established comprehensive understanding of the debt product and underlying company/industry to address investor concerns
    - Monitored various metrics around investor questions, including question frequency, length, and subject, tracking key patterns through the Q&A process and communicating feedback to Senior Bankers to actively adjust the product marketing process

M&A and Strategic Finance

- Lead Analyst to support BMC Software's $1.4 Billion financing transaction to acquire Compuware (Mainframe Application Developer)
    - Built comprehensive revenue forecast of the combined company, examining potential earnings instability due to customer churn and contract length to accurately assess business and credit risk
    - Conducted extensive research of mainframe software industry and key end market drivers, evaluating each company's total addressable market to ultimately establish a robust investment case presented to Managing Directors and C-Suite Executives
- Lead Advisor to Stonepeak Infrastructure Partners' ~$830 Million Recapitalization for Lonestar Holdings (Midstream Company)
    - Performed deep dive on midstream energy industry, assessing strategic positioning of relevant basins with respect to oil pricing
    - Headed sponsor liaison efforts between internal team and 40+ investors, facilitating correspondence and potential credit concerns

BNP PARIBAS   Jersey City, New Jersey
Summer Data Analyst   *July 2017 – August 2017*

- Assisted in building and maintaining a centralized repository for all Global Custody information within the U.S. Tax Services Team
- Communicated with 40+ sub-custodians to collect and compile market data and withholding requirements for reclaim procedures
- Managed daily operational processes including data mining and collection, client tax documentation and account maintenance

EDUCATION

NEW YORK UNIVERSITY, Leonard N. Stern School of Business   New York, New York
Bachelor of Science in Finance and Computing & Data Science   *May 2019*

- **GPA: 3.9/4.0** | SAT: 2240/2400 (M:740, CR:720, W: 780)
- **Honors:** Magna Cum Laude, Beta Gamma Sigma, Beta Alpha Psi Honor Society, Dean's List, Founder's Day Award
- **Other experiences:** Built a personalized NYC concerts recommendation engine based on user's Spotify listening habits, Marketing Intern @ PUMA, Candidate Master @ Beta Alpha Psi

SKILLS & INTERESTS

Languages: English, Mandarin, Cantonese, and French
Interests: Dance (Hip Hop, Jazz), Sushi Restaurants, Volunteering (India, Laos, China, Thailand), Hiking, Spinning, Muay Thai