

# Joseph Cai cfa

M +44 (0) 7446 782 228

B [no-arbitrage](#) (blog)

A London NW2

E [mr.joseph.cai@gmail.com](mailto:mr.joseph.cai@gmail.com)

L [Linkedin.com/in/joseph-cai](https://www.linkedin.com/in/joseph-cai)

Permanent UK Resident

## STATEMENT

With 6+ years in M&A and corporate development, I'm a corporate finance professional by training—and a data analyst by accident. Recognised for driving progress and efficiency, I don't just do the execution, I ask questions, actively think of ways to improve and put my bold ideas forward for debate. With that approach, I have turned many non-senses and minefields into clarity and best practices in my past roles. Now I am on the lookout for my next challenge—let's connect!

## PROFESSIONAL EXPERIENCE

### Invenio Corporate Finance | Corporate Finance Sell-side M&A Associate Aug 2017 ~ Aug 2020 • London

- Assisted senior partners in the origination and execution of mandates, including 10+ lower-mid market sell-side mandates with a total value of £160m+ in diverse sectors (Consumer, Healthcare, Service and TMT).
- Promoted from Analyst Intern to Associate in 14 months for outstanding work quality and contributions to the team.
- Financial Modelling: served as the primary modeller supporting the VP, taking a leading role in building, refining and maintaining transaction models (Operating Model, DCF, LBO, M&A).
- Client Interaction: Acted as point of contact for clients, praised by partners for building trusted client-advisor relationships.
- Document Preparation: authored CIM and teasers including conducting industry and company research, presenting final work in consulting style, Clients often requested me as the lead author, with some even specifying it in engagement letters.
- Managed Due Diligence: administrating virtual data rooms coordinated virtual data rooms, handled Q&A with buyers and sellers, and worked alongside accountants and legal teams to drive the process forward.
- Mentorship: Supervised junior analysts and delivered advanced modelling training sessions.

### Crest Medical | Corporate Development (M&A) Manager/Director Jan 2021 ~ Oct 2024 • Warrington / London

- Executed three transactions with a total deal value of £15m, including one divestiture and two acquisitions.
- Promoted to Corporate Development Director for distinct contributions, becoming the company's youngest director.
- Conducted comprehensive research over multiple synergistic industries of potential acquisitions.
- Upheld the company's standards for authoring high-impact memorandums and presentations for various stakeholders.
- Developed, maintained and presented advanced financial models using Excel and Power BI, providing clear insights that informed critical commercial decisions impacting c. £50 million annually.
- Established in-house BI reporting service; developed and maintained over 30 BI dashboards and automations, results include: 30% increased shelf availability, automated quotation process, and optimised pricing (c.10% margin increase).
- Appointed interim MD, leading post-merger integration and securing an exclusive partnership with a key national account.

### Boston Consulting Group | Part-time Assistant (Intern) Jan 2016 ~ Aug 2016 • Beijing

- Supported a FinTech project pitch by conducting preliminary research on a major Chinese e-commerce company.
- Applied hypothesis-driven methodologies in a benchmarking project against TSMC for Samsung.
- Documented 50+ industry expert interviews, earning commendations from senior consultants for their depth and accuracy.

## EDUCATION

### Imperial College London, Business School 2016 ~ 2017

- MSc Finance & Accounting with Distinction (GPA 83/100); Recognised in Dean's List for Academic Excellence
- Core Modules:

Financial Accounting	Mergers & Acquisitions
Private Equity & Venture Capital	Investment & Portfolio Mgt.
Structured Credit & Equity Products	Advanced Corporate Finance

### University of International Business and Economics (China) 2012 ~ 2016

- Bachelor of Economics, Major in Finance; First-class equivalent (GPA 90/100)

## SKILLS & STRENGTHS

- Financial Statement Analysis & Valuation
- Advanced Financial Modelling with Excel
- Expert in Microsoft Office Suite
- Excellent numerical and quantitative skills
- Programming skills (SQL, Python, MATLAB, Typescript)
- Advanced data skills (PowerPivot, Power BI, M)
- Project management and stakeholder management
- English, Mandarin

## INTERESTS & OTHER

**Interests** Tech enthusiast; Coding hobbyist; Guzheng Instrumentalist (professionally certified); Roller-skating.

**Volunteering** Member of CFA UK Social Committee; Fundraise coach for social impact start-ups/projects on MovingWorlds.