

Joseph Cai, CFA

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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 crunch numbers; I make sense of them, turning complexity into clarity. Now on the lookout for my next challenge—let's connect!

PROFESSIONAL EXPERIENCE

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.

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 performance and impact on high-value mandates.
- Led the development of advanced financial models (Operating Model, DCF, LBO, M&A) that supported deal negotiation.
- Praised by senior partners for building trusted client-advisor relationships.
- Authored CIM presentations and teasers; frequently named in Engagement Letters as the key author for CIMs.
- Conducted industry research and competitive analysis; summarised key trends and findings in written reports.
- Managed transaction by administrating virtual data rooms and Information Request Lists (IRLs) during due diligence.
- Supervised junior analysts and delivered advanced modelling training sessions.

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	Derivative
Structured Credit & Equity Products	Investment & Portfolio Mgt.
	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

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| <ul style="list-style-type: none">Financial Statement Analysis & ValuationAdvanced Financial Modelling with ExcelExpert in Microsoft Office SuiteExcellent numerical and quantitative skills | <ul style="list-style-type: none">Programming skills (SQL, Python, MATLAB, Typescript)Advanced data skills (PowerPivot, Power BI, M)Project management and stakeholder managementEnglish, Mandarin |
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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