

Joseph Cai CFA

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STATEMENT

Tech-savvy and entrepreneurial Chartered Financial Analyst (CFA) with a strong track record in M&A execution & support, financial modelling, ppt presentations, due diligence and BI dashboards and reporting. I am passionate about data-driven decision making and keen on bringing my skills in both data and corporate finance to my next team.

PROFESSIONAL EXPERIENCE

Crest Medical | M&A Support & BI Data Analytics (Part-time) London • Nov `24 ~ Current

- Drafting critical internal and external business documents, including board reports, investor presentations, and fundraising pack, to support executive decision-making and capital-raising efforts.
- Developing ad hoc analytical reports to support strategic decision-making across various business functions.
- Overseeing and maintaining the company's business intelligence (BI) infrastructure and data refreshing performance.

Crest Medical | M&A Manager & Corporate Development Director Warrington • Jan `21 ~ Oct `24

- 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 national account.

Invenio Corporate Finance | M&A (Sell-side) Associate London • Aug `17 ~ Aug `20

- 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 relationships.
- Document Preparation: authored CIM and teasers including conducting industry and company research, presenting final work in consulting style presentations, received consistently favourable feedback from clients and colleagues.
- 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.

Boston Consulting Group | Part-time Assistant (Intern) Beijing • Jan `16 ~ Aug `16

- 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 & accuracy.

EDUCATION

London School of Economics and Political Science (LSE) 2025 ~ 2026

- Aspiring candidate for MSc Data Science (Department of Statistics)

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 2012 ~ 2016

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

SKILLS & STRENGTHS

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