Daniel Morgan
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Professional Summary

Analytical and results-driven finance professional with 6+ years of experience in investment analysis, financial modeling, and portfolio management. Strong background in corporate finance, budgeting, and strategic planning. Adept at interpreting complex financial data to support informed decision-making.

Work Experience

Financial Analyst
CapitalEdge Investments, London
April 2020 – Present

- **Built financial models to assess risk and return for investment portfolios**

- **Conducted industry and company research to support investment decisions**

- **Collaborated with portfolio managers on quarterly reviews and rebalancing**

- **Prepared detailed financial reports and presentations for stakeholders**

Junior Finance Associate
BrightStone Partners, London
July 2017 – March 2020

- **Assisted in budgeting, forecasting, and variance analysis**

- **Supported M&A due diligence and valuation work**

- **Maintained dashboards for tracking KPIs and financial metrics**

Skills

- **Financial Modeling & Valuation**

- **Investment Research**

- **Excel, Power BI, Bloomberg Terminal**

- **Budgeting & Forecasting**

- **Report Writing & Presentation**

- **Team Collaboration & Communication**

Education

B.Sc. in Finance
London School of Economics (LSE) — 2017

Certifications

- **CFA Level II Candidate**

- **Financial Modelling & Valuation Analyst (FMVA) – CFI**