

# UMAR SAMIR

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## PROFESSIONAL SUMMARY

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Dedicated and high performing finance professional with extensive investment banking experience, from executing corporate M&A's to working with experts on sector valuation and industry research assignments, deploying analytical skills to serve clients on capital raising projects and being at best on timely delivery of deadlines. A skilled resource having hands-on experience of providing end-to-end M&A advisory, bringing in best practices to ensure smooth execution of corporate deals. With the ability to work independently and analyze complex problems, currently seeking an experience filled position to further my learning and progress my career in the field of finance.

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## SKILLS

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- Exceptional and effective interpersonal skills.
- Excellent project and client management skills.
- Excellent analysis and problem-solving skills.
- Excellent Microsoft office skills.
- Effective leadership qualities and a multi-tasker.
- Ability to work with a little direction using own initiative and equally effective as a team player.
- Effective within cross-functional teams and ability to take lead/ownership.
- Led sale/buy mandates, providing end-to-end deal advisory.
- Effective financial modelling skills including (Business valuation and Debt raising for acquisition).
- Led industry report initiative.
- Fully equipped with the knowledge of buy/sale side processes, documentations, and procedures.
- Led sector valuation initiative.
- Effective grip on data sourcing platform such as Pitchbook, Capital IQ, Credit safe & Value8.
- Deadline-oriented but never compromise quality.
- Adaptable and flexible in meeting changing requirements and priorities.
- Led business development initiatives, scoring clients.
- Quick learner & Out of the box thinker.
- Effective research and data scrapping, analyzing, and processing skills.
- Effective negotiation skills.
- Effective Due Diligence facilitation (Well versed with Caplinked).

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## WORK HISTORY

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### ***Danescor (Pvt)Ltd***

Senior Associate:

***Dec 2022 - Dec 2023***



*Associate*

***Sep 2021 - Dec 2022***



*Analyst*

***Oct 2020 - Sep 2021***

- Expert on running buy & sale-side M&A mandates, providing end-to-end deal advisory.
- Execution of debt raising assignment for buy-side clients.
- Led industry research initiatives, analyzing companies, industries, and financial performance.
- Development of marketing materials including financial models, confidential memoranda, and presentations.
- Performed business valuation assignments.
- Led sector valuation assignment/reporting.
- Effective transaction due diligence facilitation.
- Led data analysis and management assignments.
- Led corporate business development from lead generation to client conversion.

## ***S&P Global Pakistan***

***Mar 2019 – Dec 2019***

### **Associate Client Operations:**

- Accomplished financials and other document work and reports generation; administered staff and maintained reports on productivity, steer efforts towards overall management of operations.
- Directed all functions and activities associated with daily operations, as well as followed company standards and service levels.
- Successfully delivered research & analysis support to the clients regarding the product data and preparing financial models.
- Delivered product support via phone, email, and other mediums.
- Make suggestions regarding product usability, presentation, and data quality.
- Functioned in close coordination with product teams on thorough testing of our products.
- Facilitated Senior Associates in projects to improve subject matter expertise.

## ***PIA & Civil Aviation Authority***

***Apr 2018 – Mar 2019***

### **ACCA Trainee**

- Efficaciously prepared, examined and analyse financial statements, banks books, bank reconciliation statements and reports to assess accuracy, completeness, and conformance to reporting and procedural standards.
- Supervised all finance functions, including month end closing, financial reporting, maintaining receivable & Payable Accounts.
- Rendered keen eye for details to prepare withholding tax log, commercial & non- commercial billing, TA/DA adjustments, and reporting revenue from ticket sales.
- Performed finance and accounting duties, including posting journal entries, analysing general ledger, and accounting documents and Tax reporting.

## ***First Microfinance Bank***

***Oct 2018 – Jan 2019***

### **Team Lead – Risk Intern**

- Exercised hands-on approach and supervised internal control while managing books of account, maintained client logs, and monitored weekly and monthly cash flow forecasting as well as examined trend of client debt history.
- Application of Standard deviation to assess client risk.
- Score card analysis to assess client risk.

## EDUCATION

### **ACCA**

ACCA Finalist (Passed F1 – P4)  
2 papers remaining

***Dec 2012 – Present***

### ***Oxford Brookes University***

BSc Hon's in Applied Accounting

***Dec 2012 – Mar 2018***

### **ACCA**

Advanced Diploma in Accounting & Business

***Dec 2012 – Jan 2018***

### **ATHE**

Level/6 Diploma in Management

***Jun 2014 – Mar 2015***

### ***SLS Montessori & High School***

Matric (Sciences)

***Jun 2005 – Jul 2007***

## Industry Report

### ***Report by: Umar Samir***

*Title: M&A in Marketing Technology*

### ***Report by: Umar Samir***

*Title: M&A in Regulatory Technology*

## Sector Valuation

### ***Report by: Umar Samir***

*Title: Managed Services Valuation Report*

## Transactions Experience

- Provided end to end advisory and facilitation to sale side Telecom clients.
- Facilitated in arranging debt fundings for a buy-side Telecom client.
- Ran sales mandates for IT services businesses.
- Immense experience on the buy-side in finding strategic fits and facilitating them in the advance stages of the transaction including due diligence support.

## TECHNICAL SKILLS

- Well versed with Microsoft Office (PowerPoint, Excel, and Word).
- Financial modelling.
- Expert in using Capital IQ, Credit Safe, Value8 & Pitchbook.
- Business valuation expertise.
- M&A deal advisory.
- Client Management.
- Project Management.
- Business Development.
- Cashflow budgeting and forecasting.

## REFERENCES

Furnished Upon Request