Syed Muhammad Kazim Raza

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in linkedin.com/in/smkr

Summary

√#: 50 (\$150 Million Approximately) √#: 2 (\$5 Million Approximately) √#: 9 (\$290 Million Approximately) √#: 2 (\$80 Million Approximately)

√#: 450+ (Equity Value: \$30,000 Million Approximately) √#: 50+ (Investment Raised: \$20 Million Approximately) √#: 30+ (Investment Raised: \$15-20 Million Approximately)

√#: 15+ (Equity Value: \$300 Million Approximately) √#: 1 (Equity Value: \$200 Million Approximately)

√#:7+ **√**#: 125+

As a Merger and Acquisition (M&A) specialist with over 12 years of experience, I have developed a deep understanding of the complex processes and challenges involved in bringing two companies together. My expertise in this field has been honed through a combination of education, hands-on experience, and a proven track record of success.

Throughout my career, I have managed a wide range of M&A deals, from small acquisitions to multi-billion dollar mergers. My approach is always focused on identifying and understanding the unique needs and goals of each client, and working closely with them to develop customized strategies that drive value and maximize returns.

With a keen eye for detail and a deep understanding of financial analysis and due diligence, I am adept at identifying opportunities for growth and optimizing deal structures. I am also skilled at navigating complex legal and regulatory landscapes, ensuring that all deals are conducted in a compliant and ethical manner.

As an M&A specialist, I am committed to building long-term relationships with my clients and helping them achieve their strategic objectives. Whether working with startups or Fortune 500 companies, I bring a wealth of experience and expertise to every engagement, and I am passionate about delivering results that exceed expectations.

My daily mantra: "Stay humble, not small."

Contact me if you need help from a professional

kazim@invexic.org

Experience



Managing Partner, Head of M&A and Strategic Advisor

Invexic

Jan 2012 - Present (11 years 7 months)

I am a results-driven professional with a proven track record of success in leading organizations through complex mergers and acquisitions, strategic partnerships, and corporate restructuring initiatives.

With over 12 years of experience in M&A and strategic advisory, I bring a unique combination of financial, legal, and operational expertise to every engagement. My ability to identify and execute value-creating strategies has helped numerous organizations achieve their strategic objectives and optimize their performance.

In my current role, I oversee all aspects of M&A and strategic advisory services, including identifying and evaluating potential targets, developing and executing transaction strategies, negotiating deal terms, and managing post-merger integration activities. I also provide strategic guidance to senior executives and board members, leveraging my deep understanding of industry trends, competitive dynamics, and regulatory environments.

Key Skills and Qualifications:

Extensive experience in managing M&A transactions, including due diligence, deal structuring, and negotiation

Strong financial analysis and modeling skills, with the ability to evaluate complex financial and operational data

In-depth knowledge of legal and regulatory frameworks governing M&A and corporate restructuring activities

Excellent communication and interpersonal skills, with the ability to build and maintain relationships with key stakeholders

Proven track record of successfully completing transactions and driving value creation for clients Strong leadership skills, with the ability to motivate and manage cross-functional teams If you're looking for a strategic advisor with a proven track record of driving successful M&A transactions, let's connect.

Chief Executive Officer

Financial Acumen

Jan 2016 - Present (7 years 7 months)

Chief Executive Officer

Hevin Tech

Jan 2020 - Present (3 years 7 months)

Financial Advisor

mylagro

Jun 2021 - Present (2 years 2 months)

Taxation, Bookkeeping and Financial Monitering

JBuzzLogic

Jan 2016 - Present (7 years 7 months)

Polygon/Matic swing trader

Choice Consulting, LLC Jan 2022 - Dec 2022 (1 year)

⋈ Financial and comparative analysis

Imago Advisory
Aug 2021 - Dec 2022 (1 year 5 months)

Financial Consultant

SYSSOFT SOLUTIONS LTD

Jan 2021 - Dec 2022 (2 years)

Quickbooks Online Expert

Hari Amarnath Apr 2022 - Nov 2022 (8 months)

■ Mergers and Acquisitions Advisor

CT Holdings Jan 2022 - Nov 2022 (11 months)

■ Venture Capital Investment Analyst

Waleed B Jan 2022 - Oct 2022 (10 months)

Professional Financial Analyst | Equity Research Analyst | Investment Analyst Upwork

Jun 2016 - Oct 2022 (6 years 5 months)

Looking for someone that have skills in financial modelling on excel

Amine Chraibi Dakhama May 2022 - Sep 2022 (5 months)

f Professional Financial Analyst | Equity Research Analyst

Fiverr

Jul 2016 - Sep 2022 (6 years 3 months)

Perform Customer Customer Churn Analysis for cloud based services and products

Dataquest Group Jun 2022 - Aug 2022 (3 months)

Excel Expert Needed

Gigazone Global Dynamics(Pty)Ltd

Jun 2022 - Aug 2022 (3 months)

■ DeFi analyst to do daily research and source investment strategies and ideas

OB TRADING LIMITED

May 2022 - Aug 2022 (4 months)

Create A Pitchbook Summary

Legacy Wealth Builders, LLC

May 2022 - Aug 2022 (4 months)

Financial Modelling and Financial Model for your business

Abdullah Kg

Jun 2022 - Jun 2022 (1 month)

Business Analyst required for a client report writing

Ali Almanasra

May 2022 - Jun 2022 (2 months)

Financial Analysis & Modeling

Sjard Braun

May 2022 - Jun 2022 (2 months)

LBOFinancial model

Alfred Emmanuel Awe

May 2022 - May 2022 (1 month)

Review my LBO model (beginner)Review my LBO model (beginner)

Amel Smith

May 2022 - May 2022 (1 month)

Financial model check

CIP

May 2022 - May 2022 (1 month)

■ Waterfall Worksheet & Sensitivity Charts

Barry Ruby

May 2022 - May 2022 (1 month)

🔑 Financial Modelling - Housing Project

Cloverleaf Impact Capital

Apr 2022 - May 2022 (2 months)

Create 6 yrs of Financial Statements in 10 days

PE Productions

Apr 2022 - May 2022 (2 months)

Shipping Financial Performance

SON OF ZEUS LIMITED

Apr 2022 - May 2022 (2 months)

Financial Analyst

Seth Nyenya

Feb 2021 - May 2022 (1 year 4 months)

Share Cap Table Modelling (Carta expert)

Livwell Holding Pte Ltd

Apr 2022 - Apr 2022 (1 month)

Financial statement and valutation

Dania Issa Ibrahim Abu Ajaj

Mar 2022 - Apr 2022 (2 months)

■ Venture Capital Investment Analyst

Waleed B

Jul 2021 - Apr 2022 (10 months)

Bookkeeper/Accountant - Spreading Public Company Financials

Hari Amarnath

Nov 2020 - Apr 2022 (1 year 6 months)

Mergers and Acquisitions Advisor

Exit Your Way®

Mar 2022 - Mar 2022 (1 month)

Financial Analyst to create investment memo - IMMEDIATE HIRE

Lebenchaus

Mar 2022 - Mar 2022 (1 month)

M&A Valuation Case Study

DANIEL L MAZUR

FP&A Financial Market Research Acquisitions & Market Size

Touch Horizon LLC.

Mar 2022 - Mar 2022 (1 month)

Business plan and Financial Model

KDB Land and Air LLC

Sep 2021 - Mar 2022 (7 months)

Business Valuation (Project)

Round 2 Holding LLC

Feb 2022 - Feb 2022 (1 month)

■ Waterfall Analysis to financial projections

KINGSBRIDGE ARMORY

Nov 2021 - Jan 2022 (3 months)

Waterfall Analysis to financial projections

KINGSBRIDGE ARMORY

Nov 2021 - Jan 2022 (3 months)

Financial Engineer

Oct 2021 - Jan 2022 (4 months)

Audit and Assurance Supervisor, Financial and Tax Advisory (Supervisor)

PrimeGlobal - The Association of Advisory and Accounting Firms

Aug 2020 - Jan 2022 (1 year 6 months)

Perform Statutory Audits of Companies including Public and Private entities

Perform Internal Audits of Companies including Public and Private entities

Perform Corporate Advisory of Companies including Public and Private entities

Perform Financial Advisory of Companies including Public and Private entities

Perform Taxation of Companies including Public and Private entities

Key activities include:

- Collating, checking and analyzing spreadsheet data
- Examining company accounts and financial control systems
- Gauging levels of financial risk within organizations
- Checking that financial reports and records are accurate and reliable
- Ensuring that assets are safeguarded
- Identifying if and where processes are not working as they should and advising on changes
- Preparing reports, commentaries and financial statements

- Liaising with managerial staff and presenting findings and recommendations
- Ensuring procedures, policies, legislation and regulations are correctly followed

Financial Model and Analysis

Marcell Boaventura

Dec 2021 - Dec 2021 (1 month)

Financial Analyst to build a Financial Model for a business portfolio

Michael Idhalama

Nov 2021 - Dec 2021 (2 months)

SaaS Startup Financing, Valuation, and Growth

iLecture

Oct 2021 - Dec 2021 (3 months)

SaaS Startup Financing, Valuation, and Growth

Dat Dinh, Analysis of Financial Models for a stock

DINH, DAT TAN

Nov 2021 - Nov 2021 (1 month)

🚺 Financial Model for Amazon project

Cozy

Oct 2021 - Nov 2021 (2 months)

tax and bookkeeping

maelae

Oct 2021 - Oct 2021 (1 month)

sage implementation

Janmi callef

Oct 2021 - Oct 2021 (1 month)

LBO MODEL

IVY, ANTHONY

Oct 2021 - Oct 2021 (1 month)

Profit and Loss Statement Presentation and Forecasts

Black Book Market Research LLC

Sep 2021 - Oct 2021 (2 months)

Profit and Loss Statement Presentation and Forecasts Update



Financial Analyst for Companies Valuation

Company Confidential

Apr 2021 - Oct 2021 (7 months)

Business Valuation of Following Companies

#1 Boeing Company

#2 AMD

#3 Tesla

#4 Kroger

#5 AMD

#6 FTFT

#7 JP Morgan

#8 Ocado

#9 Verizon

#10 Amazon



Financial analyst who can help with excel modeling (CAP TABLE)

Opal

Feb 2021 - Oct 2021 (9 months)

Looking for help in calculating possible values of stock offering for privately held company. Offering will be a convertible, senior secured note that will convert into preferred stock with additional warrants at a time certain date in the future.

Should this project be successful, there is additional work that needs to be done such as updating Cap tables and double-checking to make sure all appropriate shareholder documentation has been collected from approximately 40 shareholders over the past 6 years. If documents are found to be missing, then helping to reach out to shareholders to get appropriate documents signed

Financial Analyst and Strategy Development

MEDrecord

Jan 2021 - Oct 2021 (10 months)

Financial Modelling and Analysis

Strategy Developnment



Financial Model and Analysis

A Almohannadi

Sep 2021 - Sep 2021 (1 month)

👜 Financial analysis comparison of publicly traded companies with financial ratios

C.J. Miller LLC

Sep 2021 - Sep 2021 (1 month)

Financial Analyst to perform a valuation for a innovative product

JD & Associates

Aug 2021 - Sep 2021 (2 months)

We are looking for a seasoned analyst to perform an in depth valuation on an innovative simple product that will improve upon what is already being used by millions of consumers every day. It is a product that changes the way a user butters and salts their popcorn or season any type of food that requires mixing or seasoning without spilling. The design has a provisional patent and will be used in place of the standard, which is currently used by consumers in theaters, amusement parks, stadiums, personal home usage and commercial usage in restaurants.

Candidate needs to be familiar with the following methods of valuation: Berkus Method, Scorecard Valuation Method, Venture Capital (VC) Method, Risk Factor Summation Method. We are looking to hire the right candidate immediately.

business valuation

Radio Headai Aug 2021 - Aug 2021 (1 month)

Financial Forecast for Business Plan

Jun 2021 - Aug 2021 (3 months)

Financial Forecast for Business Plan

Thomas Murphy and Associates Jun 2021 - Aug 2021 (3 months)

Investment fund pro forma development

JAMES PITTMAN

Apr 2021 - Aug 2021 (5 months)

Adaptation and development of a financial pro forma model for solar energy projects, including the following modifications:

- A. Addition and integration of fields for real estate acquisition (cost, leveraging, interest, etc.)
- B. Addition and integration of fields for electrolyzer hydrogen production and storage (CAPEX, OPEX, sale price, etc.) as a use for a variable percentage of solar energy.
- C. Addition and integration of % solar energy output utilized for power generation (as in current) versus hydrogen production (Item B above).
- D. Expansion of model with a sheet to include multiple projects for the core solar project, and each item above.
- E. Final output of 3-5 projects in a portfolio of projects.

Lululemon 3-Statement DCF From Scratch - Record Screen & Explanation

Wilson Wu

Apr 2021 - Aug 2021 (5 months)

■ Equity Research Investment Analyst Financial Modelling

Equal Bridge

Mar 2021 - Aug 2021 (6 months)

We are a startup looking to solve the income disparity gap between the rich and the poor through educating retail investors how to invest. This is only a small solution to our wider goal. Wouldn't you agree if people can do what they enjoy doing, and by having more passionate teachers, nurses, social workers in society, the world will become a better place?

- A passionate investment analyst that enjoys analyzing companies these companies will be listed on the Hong Kong Stock Exchange or New York Stock Exchange.
- In life we believe what matters most is not to ask how much you get paid, but who will you become. Hence, the analysts that joins our team will be mentored by a seasoned investment analyst who worked in New York/Hong Kong/Toronto who have worked in Morgan Stanley, American Century Investments, CLSA Capital and have shared analysis with many of the world's largest global pension funds. We hope to groom our analysts to one day have the skills and capabilities to join these firms themselves shall they wish to.
- This is a first project to see whether the analyst can be part of our long-term team.
- Some knowledge of financial modeling and accounting basics are required.

Commercial Property Feasibility Analysis report

Linghu Song Jul 2021 - Jul 2021 (1 month)

Global financial risk with foreign exchange in regards to M&A

Krishna Gandhi Jul 2021 - Jul 2021 (1 month)

Accountant to develop cash flow, balance sheet, P&L for 2 year period

Michael Robertson Consulting Dec 2020 - Jul 2021 (8 months)

taxation

Ruth Royal Jun 2021 - Jun 2021 (1 month)

Build a DCF (Discounted Cash Flow) valuation sheet

Gaurav Aidasani Apr 2021 - Jun 2021 (3 months)

Business Valuation for your Company

MENA Tijari May 2021 - May 2021 (1 month)

Financial Model and Analysis

Luke Coupe

Apr 2021 - Apr 2021 (1 month)

Financial Forecast

Thomas Murphy and Associates Apr 2021 - Apr 2021 (1 month)

Sales Financial Forecast

Thomas Murphy and Associates Apr 2021 - Apr 2021 (1 month)

MBA Case Study

SP Business Group Mar 2021 - Apr 2021 (2 months)

M°+ Calculation of Capital Expenditure and Valuation of Shares

Mohammed Mansoor + Associates / MoMa Feb 2021 - Apr 2021 (3 months)

LBO MODEL

Our Man Behind The Wheel Mar 2021 - Mar 2021 (1 month)

Discounted cash flow

Jaber Al Mas Mar 2021 - Mar 2021 (1 month)

Financial Modeling

Katheryn Finney
Mar 2021 - Mar 2021 (1 month)

Business plan, Financial Plan and pitch deck

Mishri Mal Feb 2021 - Mar 2021 (2 months)

Financial Projections / Modeling Expert Needed

Tony Williams
Feb 2021 - Mar 2021 (2 months)

CRE development financial modeling - waterfall

Tim Johnston

Corporate Tax Preparer

Villa Chardonnay, Horse with Wings Inc.

Mar 2019 - Mar 2021 (2 years 1 month)

3 Years Tax Returns

Excel expert required to set up adjustable investment metrics for presentations

MYSA Nordic Spa & Resort

Feb 2021 - Feb 2021 (1 month)

Real Estate Financial Model

Kirk Budhram

Feb 2021 - Feb 2021 (1 month)

Financial Modelling Services

Present Company LLC

Feb 2021 - Feb 2021 (1 month)

REI Fund Financial Projections / Modeling Expert Needed

Tony Williams

Feb 2021 - Feb 2021 (1 month)

Year-to-Year Financial Analysis of P&L

Black Book Market Research LLC

Jan 2021 - Jan 2021 (1 month)

Financial Analysis

Pitch Desk for Profit and Loss

Black Book Market Research LLC

Jan 2021 - Jan 2021 (1 month)

M°+ Financial statements trend analysis and ratios

Mohammed Mansoor + Associates / MoMa

Dec 2020 - Jan 2021 (2 months)

Leverage buy-out case M&A model

Pieter Dillema

Dec 2020 - Jan 2021 (2 months)

Financial Analyst

Azad Real Estate Group Ltd.

Dec 2020 - Dec 2020 (1 month)

Comparable key metrics across companies from financial statements in excel ARGENTIER PATRICK

Dec 2020 - Dec 2020 (1 month)

Create template of comparable key metrics across companies from financial statements in excel

Patrick DArgenio

Dec 2020 - Dec 2020 (1 month)

Create template of comparable key metrics across companies from financial statements in excel

Patrick DArgenio

Dec 2020 - Dec 2020 (1 month)

SAAS Financial Model - Audit

StatBid

Nov 2020 - Dec 2020 (2 months)

Audit of already prepared financial model and incorporate adjustments

SAAS Financial Model - Audit

StatBid

Nov 2020 - Dec 2020 (2 months)

Professional Financial & Investment Analysis

Freelancer.com

Aug 2016 - Dec 2020 (4 years 5 months)

• Professional Financial & Investment Analysis

PeoplePerHour

Jun 2016 - Dec 2020 (4 years 7 months)

Azad Real Estate Group Ltd.

Nov 2020 - Nov 2020 (1 month)

Financial modeling for online startup

Two Triangle Consulting

Nov 2020 - Nov 2020 (1 month)

Education



Stanford University

Machine Learning

2020 - 2020

Core Subjects:

Large Scale Machine Learning **Anomaly Detection Unsupervised Learning Support Vector Machines**

Machine Learning System Design Advice for Applying Machine Learning



🔤 🔞 CPA Australia

Associate CPA, Finance and Financial Management Services

Jun 2020 - Dec 2021



CFA Institute

Chartered Financial Analyst (Level 2), Finance and Financial Management Services

Dec 2021 - Jun 2023

Ethics

Quantitative methods

Economics

Corporate finance

Financial reporting and analysis

Security analysis

Equity and fixed income

Derivatives

Alternative Investments

Portfolio management



■ The Institute of Chartered Accountants of Pakistan

Certified Finance and Accounting Professional (CFAP), Finance and Financial **Management Services**

2020 - 2022

Core Subjects:

Advanced Accounting & Financial Reporting

Corporate Law

Business Management and Strategy

Business Finance Decisions

Advanced Taxation

Audit, Assurance and Related Services

Virtual University of Pakistan

Master in Accounting and Finance, Accounting and Finance 2018 - 2020

Core Subjects:

Information Systems

Advanced Financial Accounting

Financial Statement Analysis

Taxation Management

Entrepreneurship

Business & Labor Law

Fundamentals of Auditing

Corporate Finance

Islamic Mode of Financing

Investment Analysis & Portfolio Management

SME Management

Advanced Cost and Management Accounting



Princeton University

Bitcoin and Cryptocurrency Technologies 2020 - 2020





Yale University

Associate's degree, Financial Market 2020 - 2020



University of the Punjab

Bachelor of Commerce - BCom, Accounting and Business/Management

2011 - 2013

Core Subjects:

Banking and Finance

Auditing & Income Tax Law

Computer in Business

Principles of Marketing

Principles of Insurance

Advanced Accounting

Cost Accounting

Business & Industrial Law

Licenses & Certifications



Certificate of Accounting and Finance (CAF) - The Institute of Chartered

Accountants of Pakistan

083447

Assessment of Fundamental Competences (AFC) - The Institute of Chartered Accountants of Pakistan 083447 Diploma in Business Management & Entrepreneurship - Asean Online Education AOE **Diploma in Accounting - Advanced Controls and Transactions** - Alison Diploma in Accounting - Core Practices and Theory - Alison **Diploma in Strategic Management** - Asean Online Education AOE Xero Advisor Certified - Xero Certified ProAdvisor Intuit QuickBooks Certificate in Advance Excel - Filtered Certificate in Strategy & Business Models - Filtered Effective Listening - LinkedIn Nano Tips for Peak Performance with Shadé Zahrai - LinkedIn Accelerating Your Career with Personal Branding - LinkedIn Nano Tips for Finding Happiness Through Empathy with Shadé Zahrai - LinkedIn Nano Tips to Sharpen Your Critical Thinking with Shadé Zahrai - LinkedIn Nano Tips to Foster a Growth Mindset and Mental Agility with Shadé Zahrai -LinkedIn Nano Tips to Boost Productivity with Shadé Zahrai - LinkedIn

Nano Tips to Accelerate Your Goals with Shadé Zahrai - LinkedIn



in Nano Tips to Build Grit for Mental Toughness with Shadé Zahrai - LinkedIn

Skills

LinkedIn Recruiter • Mergers & Acquisitions (M&A) • Corporate Finance • Business Valuation • Equity Valuation • Financial Advisory • Accounting • Auditing • Banking • Finance