



VISHAL SHARMA

Date of Birth: August, 24 1996

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PROFILE

- MBA graduate specialized in Financial Markets.
- Clients Focused Financial Advisor with 3+ years of experience growing wealth for clients.
- Seeking to acquire knowledge and experience as an analyst.

WORK EXPERIENCE

INVESTRAD

(July 2021 – Current)

Advisor

- Advised clients on equity investments based on Technical Research Analysis.
- Designed Equity Portfolios like Large Cap Basket, Mid Cap Basket, Small Cap Basket, Renewable Energy Basket, Dividend Oasis, India Infra Basket, with a CAGR of 15%-20%.
- Designed a strategy named Index Revamp Strategy on Nifty 50 Derivative.
- Coordinated with various departments like dealing, RMS, CRD, Accounts, for smooth and reliable servicing to clients.

KEDIA CAPITAL SERVICES PVT. LTD., MUMBAI

(September 2019 – June 2021)

Business Development Manager

- Conducted 360-degree Financial Assessment, Wealth Management Services and by doing portfolio rewiring of the various client segment.
- Formulated strategies for expanding the client base by providing investment advice to the clients. Maintaining long-term relationships with existing/new clients for increasing the Asset Under Management (AUM) for the company.
- Acquired more than 100 clients and also looked after the B2B vertical.
- Organized events, webinars to create awareness regarding investment and Financial Planning.
- Supported and guided team on platforms like CDSL Easiest, Comris Physical Delivery, Investwell, BSE Star MF, ODIN.
- Coordinated with various departments like dealing, RMS, CRD, Accounts, for smooth and reliable servicing to clients.

KEDIA CAPITAL SERVICES PVT. LTD., MUMBAI

(April 2019 – August 2019)

Internship

- Acquired clients via seminars, webinars and corporate tie-ups.
- Research and analysis on current portfolios and preparation of review strategy and plan for existing clients.
- Cross selling various financial products to the existing set of customers and building depth within the existing relationships.

CERTIFICATIONS

- Finance of Mergers & Acquisitions: Valuation & Pricing
- Finance & Quantitative modeling for Analyst
- NISM Series 1- Currency Derivatives Certification
- NISM Series 5A- Mutual Fund Distributors Certification
- NISM Series 8- Equity Derivatives Certification
- NISM Series 10A- Investment Adviser (Level 1).
- NISM Series XV- Research Analyst.

SKILLS

- Coursework/Strong understanding in Finance-Capital Markets
- Good communication skills – written as well as telephonic.
- High level of attention to detail
- Proficiency in MS Office products – Excel, Powerpoint
- Good at working as part of a team.
- Effectively meeting deadlines
- Ability to define and solve logical problems
- Knowledge of Financial Modeling, Equity Research, Valuation, DCF, NPV, Terminal and Enterprise Value Calculation.

EDUCATIONAL QUALIFICATION

- **PGDM/MBA**- Financial Markets- ITM Business School- Navi Mumbai- 2020
- **BBA (H)**- Finance- Scottish Church College- Kolkata- 2017

LANGUAGES

- English
- Hindi
- Bengali
- Marwari