

# Vineet Nandwani

100% equity owner of my life!



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Surat, India

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## INVESTMENTS MADE:

### CFA(US) Level III Candidate

CFA Institute

August 2022

### CFA(US) Level II cleared

CFA Institute

11/2021

Secured top 10 percentile across the globe

### Finnacle Investment Academy

Finbridge

07/2017 - 11/2021

Surat

Modules

- Equity Markets
- Personal Finance
- Company Analysis
- Mutual Funds
- Financial Statement Analysis
- Special Situation Analysis

### Bachelor of Business Administration

SDJ International College

07/2017 - 09/2020

Surat

### H.S.C. (CBSE)

S.D. Jain Modern School

04/2015 - 03/2017

Surat

Score

- 92%

## MY PREVIOUS INVESTORS:

### Research Analyst

Tejimandi Investments ( A Motilal Oswal Company)

09/2021 - Present

Remote

The company offers subscription-based readymade portfolios to investors.

Achievements/Tasks

- Tracking IPOs and writing about it for company's newsletters
- Writing Personal Finance and business articles for company's newsletters
- Writing on-demand PR articles for various media agencies
- Promoting financial content on the firm's social media accounts

### Financial Advisor

Haardik Nayak Wealth Management Pvt. Ltd.

09/2019 - 07/2021

Surat

Wealth Management Firm

Achievements/Tasks

- Undertaking equity and mutual fund research by understanding company fundamentals and financial ratios
- Providing mutual funds advisory services to clients of the company
- Promoting financial planning in the firm's monthly newsletter
- Providing insurance services (all types) to clients of the company

## HUMAN CAPITAL

MS Office ( Excel, Word, Power-Point )

Fundamental Analysis

Research

## GREENFIELD PROJECTS

### Special Situation Project

- Delisting Report on Polaris Limited

### Personal Finance Project

- Mutual Fund Project
- Retirement Planning Project

### Company Analysis

- Pi Industries Limited

### Industry Analysis

- Agro-chemical Industry Report

## ALTERNATIVE INVESTMENTS

NISM Research Analyst Certification: XV  
(09/2022 - 09/2025)

NISM Investment Advisor: X-A and X-B (02/2021 - 02/2024)

CFA Institute Investment Foundation Program (10/2018)

Stock Market Simulation Game (02/2018)

BRCM College of Business Administration

## INVESTMENTS ON HEALTH

Listening Music

Walking

Cricket