

## Devansh Shah

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Residence: Vile Parle (W), Mumbai – 400056

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### **Professional Synopsis:**

Looking Forward to a challenging work atmosphere which can escalate my knowledge and enrich me with practical analytical approach in this everchanging financial ecosystem. I see myself getting industry ready with exhaustive research, on various aspects mainly equity valuations, investments, and portfolio management in the financial markets.

### **Work Experience:**

**Company:** Dalal & Broacha Stock Broking Pvt. Ltd. ([Website](#))

**Designation:** Mutual Fund Research Associate

**Period:** 30<sup>th</sup> June, 2021 – Present

#### **Role:**

- Responsible for Conducting mutual fund in-depth research, tracking performance, reviewing client portfolios
- Part of the mutual fund research team where in asset allocation decisions in terms of wider categories and inner categories
- Managed portfolios various types and sizes of portfolios from retail clients to high Net worth clients (upto 60 crores)
- Lead the mutual fund research team from March 2022.
- Preparing weekly / monthly reports, Product / Sector Outlook Notes and Sales Kit (that includes content related to personal finance related topics) for RMs which in turn will help them spread financial awareness among their current & prospective clients. Also, Give financial advice to various clients.
- To connect with Mutual Fund Houses - Fund Managers & RMs for different fund's strategy / portfolio positioning, Queries based on research, Market Outlook, etc.
- Understanding the basics of various other investments like REITS, InvITs, Liquiloans and Fixed Income Products.

### **Co-Curricular Projects:**

#### **Valuation of InterGlobe Aviation, PVR Ltd**

- DCF Model used along with Comparative company model to value the company.

#### **Analysing and Valuation of Five Companies of the Packaging Sector using EIC Model and deciding whether to invest in these companies or not.**

- Top- Down analysis of the packaging sector, then chose 5 companies from the sector and decided whether to invest or not in the company.

#### **Analysing Annual Report of Ten companies on the basis of Management Discussion and Analysis, Corporate Governance and Corporate Social Responsibility.**

- Part of the Summer Project

#### **Financial Plan of a Family with a Disabled Child**

- Made an in detail financial plan for a disabled child and his family

#### **Research Paper: Aspects of IPO Pricing and Speculation in India**

Conducted Primary research:

- To Gain insights for oversubscription and high listing gains of IPOs in India.
- To understand the factors that affect the listing price of the IPOs
- To understand the role of BRLMs in the pricing of IPOs

**Education:**

- 2022**      **Chartered Financial Analyst (CFA) Level 2 November - Pursuing**  
**Chartered Financial Analyst (CFA) Level 1 February- Cleared**
- 2018-2021**   **Anil Surendra Modi School of Commerce (NMIMS University)**  
• B.Sc Finance- CGPA (3.26/4.0)
- 2016-2018**   **Malini Kishor Sanghvi College of Commerce and Economics**  
• H.S.C in Commerce (79.08%)
- 2016**        **Utpal Shanghvi Global School**  
• I.G.C.S.E (64.50%)

**Certifications:**

- Excel Skills For Business : Intermediate II – Macquarie University
- Technical Analysis Master Class
- NISM Series X-A : Investment Advisor Level 1
- NISM Series V-A: Mutual Fund Distributors Certification
- NCFM: Financial Markets: A Beginner's Module
- ICICI Prudential Life Insurance Agency

**Technical Skills:**

- Proficient in Microsoft Office Suite, including; Excel, Word, PowerPoint and Access.
- Mutual Fund Software used – Investwell, MFI & Morning Star Advisor Workstation
- Financial Modelling
- Basics of Google Analytics and Digital Marketing
- Basic Knowledge of SAS (Statistical Analysis System)

**Core Competencies:**

- A self-starter who is able to work independently & also lead in group initiatives
- Quick Learner with strong analytical & detail-oriented mind-set

**Areas of Interest:**

- Stock Trading, Interacting with new people, Drama, Sports, Bollywood, Twitter and Travelling

**Languages Known:**

- English, Hindi and Gujarati

**I hereby declare that the above mentioned information is true to the best of my Knowledge.**

**Belief**  
**Devansh Shah**

**Place:** Mumbai  
**Date:** 15<sup>th</sup> October, 2022