

Rutam Yellapurkar

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PROFILE

- Cleared CFA Level 1 exam in November 2022 with limited practical experience with the ability to read and understand financial statements.
- Enthusiast to work in a learning and challenging environment, utilize my skill and knowledge to contribute my financial skills by having a keen eye for detailing.
- Proficiency level in English, Hindi, and Marathi.
- Professional Badminton Player

SKILLS AND TRAINING

- Ratio analysis.
- Portfolio Construction Using Modern Portfolio Theory
- Financial Reporting
- Self-motivated and initiative-driven
- Strong Team Player and a Quick Learner
- Microsoft Excel, Word, and PowerPoint.

EDUCATION

Passed CFA Level 1, CFA Program (November 2022)

B COM (Accounting and Finance), 2019 – 2022 CGPI: 9.38

S.K Somaiya Degree College of Arts, Science, and Commerce

HSC (Higher Secondary Certificate), 2019 83.69%

K.J Somaiya College of Commerce

SSC (Secondary School Certificate), 2016 85.2%

Vidya Niketan, Dombivli

CERTIFICATIONS

NISM XV Research Analyst Certification (Validity: May 31, 2022 - May 20, 2025)
SEBI

Introduction to Portfolio Construction and Analysis with Python
Coursera (EDHEC Business School: Online non-credit course)

Investment Management Virtual Program
Forage

ACHIEVEMENTS

First Position in Investment Case Study Challenge.
Organized by: Symbiosis College, Noida

Second Position in C-Ace the Fund
Organized by: Keshava Mahavidyalaya, University of Delhi

PROFESSIONAL EXPERIENCE

Financial Valuer, February 2021 – June 2021

Catalyst Partners

- Worked on Relative Valuation guided by Sir.
- Dealt with Ratio Analysis of Companies.
- Helped Sir in preparing a presentation on SME IPO