



Bhavik B. Shah

Contact

Phone:

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Date of Birth: 31st Aug 1990

Address:

Mumbai, Maharashtra, India

Skills

- Financial Statement Analysis
- Ratio Analysis
- Creating Financial Models and Valuation Methodologies
- Company, Industry & Economic Analysis – Conduct Quantitative and Qualitative Analysis
- Derivative Hedging Strategies
- Preparation of Investment Write ups, quarterly updates and Pitch Book
- Operations and Process development
- Bloomberg, MS Office, Excel and PowerPoint
- Ethical, Reliable, Approachable, Friendly, Energetic, Flexible

Career Objectives

- Seeking an opportunity to contribute towards business growth.
- A job profile in which I am able to apply my competencies towards business success.
- A responsibility that could enhance my inter-personal and technical skills.

Academic Details

CFA Institute, USA

July 2021

CFA Charterholder

Lala Lajpatrai Institute of Management, Mumbai Board

May 2013

MBA (Finance) – 74.6%

K.P.B. Hinduja College of Commerce, Mumbai Board

July 2011

Bachelor of Commerce – 72.9%

K.P.B. Hinduja College of Commerce, Mumbai, Maharashtra State Board

June 2008

Higher Secondary Class – 65.2%

St. Paul's High School, Mumbai, Maharashtra State Board

June 2006

Secondary School Certificate – 74.1%

Other Certifications

- **Online Internship Project Certification – Edu Corporate Bridge**
August 2012
Financial Modelling
- **Summer Internship Project - Birla Sunlife Insurance**
May 2012 – June 2012

Languages

- English
- Hindi
- Marathi
- Gujarati

Corporate Experience

Founder – Sebi Registered Investment Advisor (RIA)

Dec 2021 to till date

BHAVIK BHAGWANJI SHAH PROPRIETOR

Associate Analysts - Research

Nov 2018 to Feb 2020

Ace Lansdowne Investments Services LLP

Equity Research Associate

Dec 2017 to Nov 2018

Dolat Capital Market Pvt Ltd

Equity Research Associate

May 2017 to Dec 2017

KR Choksey Shares & Securities

Assistant Manager – Member Service Management

Jan 2014 to May 2016

National Stock Exchange of India Ltd