Vinayak Halapeti

Parel, Mumbai - 400012 | 8286168069 | halapeti.h.vinayak@gmail.com |

Summary

A professional pursuing CFA Level 3 with 5.8 years of experience, comprising 4 years in a Broking Firm and 1.8 years in Ernst & Young LLP as an Associate Consultant. Possessing expertise in financial spreading, credit analysis, financial analysis, credit report writing, financial modeling, and company valuation

Education

CFA LEVEL 2 PASSED | 2022 | CFA INSTITUTE (U.S)

BACHELOR OF FINANCIAL MARKETS| 2016 | MUMBAI UNIVERSITY

Skills & Abilities

- Advance Excel Skills: Lookups | Basic Business Math & Statistics | Pivot table | Power Query | Basic VBA | Charts | Financial Functional.
- Finance Skills: Financial Modelling | Company Valuation (DCF, Relative and Transaction Valuation) | Financial Analysis | Ratio Analysis | Industry knowledge | Primary and Secondary Research and analysis.
- Other Skills: Option Valuation | Fixed Income Valuation | Option chain analysis | Option Greeks | Alternative Investment | Portfolio Management | MS Word | MS PPT.

Certification

- Certified Investment Research Analyst (Equalifi)
- Certified Alternative Investment Manager (Equalifi)
- Certified in Investment Banking (Equalifi)
- Company Valuation & Financial Modeling (Udemy)
- Capital IQ Fundamentals (CFI)

Experience

ASSOCIATE CONSULTANT | | ERNST & YOUNG LLP | MAY'21 – DEC'22

- Supporting a banking sector client in performing credit assessments for its customers in the U.S and U.K region
- Analyzing and spreading the financial statements in Moody's Credit Lens.
- Analysis of financial statements including Income statement, Balance Sheet & cash flow of public & private companies for the credit appraisal process.
- Normalizing the financial statement for exceptional and non-recurring items to arrive at the true profitability figures.
- Preparing credit write-ups for Wholesale Banking customers. Reading the financial reports of the company of public and private companies and doing analysis year on year, quarter on quarter, and half-yearly.
- Commenting on financials based on own opinion.
- Ratio analysis (mainly related to credit), Financial Modeling, and projections based on specific credit scenarios.
- Analyzing Business, Financial, Industry, and Risk Management. Preparing technical opinion analysis

RELATIONSHIP MANAGER - DEALING | SMC GLOBAL SECURITIES LTD | FEB'19 TO MARCH'21

- Provided investment advice and executed trades on behalf of clients.

- Reactivated dormant clients and focused on generating new business while maintaining a high level of retention of existing customers.
- Enhanced profitability by cross-selling other products of the organization like mutual funds, insurance, FD, IPO, PMS, etc.

EQUITY DEALER | ANGEL BROKING LTD | AUG'17 TO SEP'18

- Executed trades on behalf of clients and promoted third-party products.
- Solved customer queries and confirmed trades done by EOD.
- Enhanced profitability by cross-selling other products of the organization like mutual funds, insurance, FD, IPO, PMS, etc.

JUNIOR EXECUTIVE AOD | SHAREKHAN LTD | AUG'16 TO APRIL '17

- Verified and scrutinized account opening forms and documents.
- Maintained MIS and reported to the team leader.

Projects

Financial Modeling of Tata Motors, Netflix, Persistent Systems, Hindustan Unilever.

Models Includes:

Historical Financial Analysis | Ratio Analysis | Forecasting | WACC | Beta – Regression | Common size Analysis |DCF Valuation | Relative valuation.

Additional Information

- Date of Birth – 30/05/1995
- Marital Status – Unmarried
- Languages Known – English, Hindi, Kannada.