

Kavitha Menon, CFA

Singapore Citizen

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Work Experience

Global Equity Analyst, Foord Asset Management

Jan 2016-Till Date, Singapore

Equity Analyst covering Global Financials at a multi-billion dollar private investment fund based in Singapore.

- Sole responsibility of **managing investment opportunities in Global Financials sector** covering banks, insurance and asset management companies
- Managing a model portfolio of **Global equities** which has generated an **absolute performance of +14.8%** in 2016 (From Feb)
- Managing a model portfolio of **Global financials** which has generated an **absolute performance of +34.4%** since inception
- Work with a **team of five portfolio managers on two funds with global equities mandate (AUM: US\$4bn)**
- In-depth **research and understanding of broader macro-economic cycle and banking industry drivers globally**
- Analyse new investment opportunities in Financials with **detailed bottom-up analysis and present investment conclusions and recommendations** to the portfolio managers
- Lead **one-on-one interactions with CEO's and CFO's of major corporates at conferences, meetings and bespoke trips**
- Develop and maintain **financial models** for all investment positions in Global financials
- Strong quantitative skills and analyse **intrinsic value of businesses by using various valuation methodologies like DCF, Relative valuation, SOTP etc**
- Experience working on wide array of **database sources – Bloomberg, Factset, Thomson Reuters**

Senior Analyst, Chandler Corporation

Apr 2013-Dec 2015, Singapore

Senior Analyst covering Global Financials at a multi-billion dollar private investment fund based in Singapore which focusses on investing in public and private equities in Energy, Consumer, Financials and Healthcare.

- Work directly with the **Head of Listed Investments** on driving **top-down asset allocation decisions** in **Global Financials** with specific focus on emerging markets
- **Own and make investment recommendations on existing financials portfolio** by actively following Political developments, Policy & Regulatory changes, Quarterly results, Valuations, Technicals etc
- Analyse **new investment opportunities** from a top-down and bottom-up perspective and make **investment recommendations** to the Chief Investment Officer
- Write fundamental **investment research reports** to recommend deep-value investment opportunities in the **Financials sector**
- Develop and maintain **financial models** for core investment positions in Global financials
- **Lead one-on-one interactions with senior management** of corporates at various conferences and meetings

Equity Research Associate, IDFC Securities

Feb 2011-Jul 2012, Mumbai

Associate covering Financials and Strategy at one of India's leading equities broker (No.6 ranked Equity research team in India in the Asia money polls 2011) for institutional investors, catering to domestic as well as overseas financial institutions.

- Co-authored research reports with **Wall Street Journal rated Asia's Best Financial Services Analyst 2011**, providing in-depth **financial analysis and investment recommendations on 25 stocks in the Indian banking sector**
- Worked directly with the **Co-Head of Research** on Indian equity market strategy providing detailed top-down macroeconomic analysis and equity market outlook. Work done in this regard led to us being ranked as 5th best strategy team in India in the Asia money polls 2011 from being 12th in the previous year
- Responsibility of maintaining regular interaction with clients and have **conducted corporate road-shows across Asia**

Equity Research Associate, Elara Securities

Oct 2009-Jan 2011, Mumbai

Associate covering Telecom, Technology and Strategy at the securities division of Elara Capital Plc, a full scale service investment bank, headquartered in UK and having a global foot print and offices across Mumbai, Singapore, New York, Zurich and Mauritius

- Co-authored the report for **initiating coverage on 4 Indian stocks in telecom space** (Bharti Airtel, RCOM, Idea, Tata Teleservices)
- Sole responsibility for conducting research, including interaction with managements, building & maintaining financial models and writing research reports (company updates, result notes, event updates etc).

Relationship Manager, Citibank N.A

Apr 2009-Sep 2009, Chennai

- Relationship manager for the Individual HNI clients and Citi business clients in the Global Consumer Group of Citibank N.A
- Managed ~150 clients with an AUM of INR 100m (US\$2m) across wealth, trade and forex requirements

Software Engineer, Infosys Technologies

Nov 2005-Apr 2007, Chennai

- Understanding clients' business requirements, translating these into business architecture and testing of the deliverables

Education

CFA: CFA Institute

Jun 2008-Jul 2012, USA

- Cleared all three levels of CFA and have been awarded the CFA charter in July 2012

MBA (Finance): Narsee Monjee Institute of Management Studies (NMIMS)

Jun 2007-Mar 2009, Mumbai

- Graduated in the **top 3 % (97th percentile)** in a batch of 240 students
- Key electives included Strategic and Portfolio Management, Corporate Finance and Financial statement analysis

BE (Electronics & Communication Engineering): SRM College of Engineering (SRM)

Jun 2001-Apr 2005, Chennai

- Graduated with **first class honours** (82.4%) and secured **overall 3rd rank in the electronics department** of SRM College of Engineering (Anna University, Chennai)

Awards & Achievements

- **Member of career committee at CFA society, Singapore** and was responsible for the ideation and launch of the society's maiden Mentorship program in 2016
- **School topper** in 10th standard matriculation examination (90.9%) at Boston Matriculation Higher Sec. School
- **School topper** in 12th standard state board examination (95.8%) at Boston Matriculation Higher Sec. School
- Won the **best outgoing student award** in the school leaving year
- Elected **student leader and sports vice-captain** at Boston Matriculation Higher Sec. School
- Won several intra and inter school and college badminton and throw-ball tournaments