

Mehul Patel

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Profile Summary

A Proactive and deadline driven finance professional with excellent communication, analytical skills with over 4.5 years of experience in providing equity research analysis along with personal Portfolio Management Services to individual clients in India. A self-learned professional seeking to utilize my skills of equity research, technical analysis, financial analysis, and/or economic analysis in a position with your firm. Equity research experience with the adaptability to successfully traverse a diverse range of fields including buy and sell side equity research and consulting. Proven ability to perform financial modeling and analysis to produce time sensitive investment research reports. Highly self-motivated, strong team player, dependable with excellent leadership qualities, results-driven, energetic, self-taught experienced person interested in leveraging analytical and problem-solving skills to provide value-added innovative thinking processes tailored directly to a firm's goals and objectives.

Skills And Interests

- Technical Analysis, Investment Research, Economic Analysis, Performance Analysis, Technical Support, Sectorial Analysis, Trend Analysis.
- Microsoft Office, Stockedge products (India), Zerodha products (India), Chartink products (India), and Screener.in products (India).
- Accounting softwares, summarizing of annual P&L
- Linguistic skills: Proficient in English, Hindi and Gujarati.

Work Experience

Business Development Officer

Truong Ly Design Inc.

Toronto, Canada

July 2023 – till present

Key Deliverables:

- Create and implement marketing strategies
- Developed the roadmap for future growth of the company
- Handling HR process of the company from start to end
- Help in administration of the business on a day to day basis
- Create proposals for different interior designing projects
- Meet clients and suppliers to assist in the growth of the company
- Organized the company into a system driven workflow and process

Equity Research Analyst

Self-employed

January 2018 – till present

Key Deliverables:

- Performed financial and investment analysis on the \$4 million combined portfolios of a individual investors by leading the daily portfolio management and trading of 13 client accounts.
- Pioneered unique investment ideas and trading strategies that helped individually.
- Managed client portfolios outperform their Balanced Fund benchmark by more than 30% for a

period of 3 years.

- Developed weekly screeners primarily for domestic small, mid, and large-cap stocks.
- Developed fundamental valuation model for identifying undervalued stocks and sectors.
- Developed a personal technical system for better exits and entries.
- Conducted in-house research and reviewed broker sell-side research when examining ideas.
- Selected and assembled a group of mutual funds for certain client portfolios.
- Identified, selected, and monitored several managers of closed-end mutual funds as part of strategic asset allocation for certain client portfolios.
- Developed detailed philosophy, process, and portfolio construction of individual clients as per their return expectations.
- Performed client asset allocation analysis, asset allocation rebalancing analysis and accordingly recommended them plans to achieve their financial goals.
- Managed client accounts executing trades, identifying appropriate asset allocation, leading routine meetings, all while providing a worldclass client experience.
- Researched the impact of corporate actions and voted in accordance with their proxy voting mandate.
- Attended quarterly con-calls and annual meetings of many listed companies and interacted with the management personally to understand the future prospects of these companies.

Senior Associate Advocate

Vimal A. Purohit Advocate – Law Firm

Ahmedabad, Gujarat, India

May, 2015 – December, 2017

Key Deliverables:

- Meeting clients and summarizing their issues
- Research on any given matter on law points and factual points
- Opine clients of their legal rights and all matters related to land laws, civil laws, commercial laws, company laws and any other civil disputes.
- Research legal precedents and gather documentary evidences.
- Plead clients' cases before courts of law, tribunals and boards.
- Draft legal documents such as real estate transactions, memorandum of understandings, contracts, wills and prepare statements of legal opinions.
- Negotiate settlements of civil disputes
- Perform administrative and management functions related to the practice of law.
- Draft non-litigation contracts for commercial purposes.
- Draft of contracts for joint ventures, sales and service contracts.
- Resolving the matters out of court through mediation.
- Assist senior lawyer Mr. Vimal A. Purohit by interviewing clients, assemble documents pertaining to delicate, high-stake and contravertial civil matters, draft pleading for the matters, and research for law point on these matters.
- Draft legal correspondences and perform general office and administrative duties.

Junior Associate Advocate

Vimal A. Purohit Advocate – Law Firm

Ahmedabad, Gujarat, India

January, 2012 – April, 2015

Key Deliverables:

- Drafted pleadings and represented in over 500 cases before High Court of Gujarat and other courts and legal fora of India in cases on real estate, land revenue, commercial, and corporate laws.
- Drafted pleadings in civil cases, including writ petitions, delay condone applications, sale deeds,

contracts, litigation proceedings.

- Assisted senior lawyers and Queen's counsels in real estate, agricultural land revenue, private property, education, and commercial cases.
- Prepared, reviewed, and proofread pleadings and legal notices.

Co-Founder & CEO

Alay Electricals Private Limited

Rajkot, Gujarat, India

January, 2008 – December, 2011

Key Deliverables:

- Came up with the ideal to start-up manufacturing business.
- Drafted the blue-print from establishment to smooth running of the company.
- Handled product designing, raw material purchasing, and sales of the products.
- Developed a pan India network of dealers and distributors of electrical products.
- Handles all sales and purchase transactions.
- Managed books of accounting and sales, design and production teams.
- Managed all the company operations as the company was a small startup.

Sales, Purchase, & Administrative Manager

Varsha Electricals (Family Business)

Rajkot, Gujarat, India

May, 2006 – December, 2007

Key Deliverables:

- Handles sales and purchases of the distribution company.
- Inventory management and customer complains.
- Managed all the accounts and transactions of the firm.

Educational Qualifications

Bachelor of Law (2003-2006)

I. M. Nanavati Law College, Ahmedabad, Gujarat, India

Bachelor of Science – Computer Science (2000-2003)

Natubhai V. Patel College of Pure & Applied Sciences, Vallabh Vidhyanagar, Gujarat, India

Bar Memberships

Advocate

Bar Council of Gujarat

2006 – Present

Additional Information

- Interests: Reading, meditation, cooking
- Residency status: Indian Citizen, Canada PR
- D.O.B.: January 30th, 1983