

Mehul Patel

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REF: APPLICATION FOR EQUITY RESEARCH ASSOCIATE

Dear Sir(s)/Madam(s),

I am approaching you to convey my genuine interest in joining the firm as Equity Research Associate. My interest in the firm stems from my past experience as self-employed equity research analyst and personal portfolio management. Since last 4.5 years, I was handling the portfolios of different clients in India and providing a Portfolio Management Services as per their requirements, financial goals, and risk appetite.

Additionally, I am a self-learned Equity Research Analyst and have worked with individual and corporate clients in managing their investment portfolios. I have a balanced approach of allocating investments in different asset classes to minimize the risk. I have developed a personal fundamental valuation modeling system for stock selection along with a technical system for refined entries and exits. My research about any given company starts with evaluating sector cycle, business models, revenue growth, net profit margins, quality of management, and future prospect of the products/services offered by the company. Further, I take part in quarterly con-calls and annual meetings to get the gist of future plans of the companies.

Additionally, after preparing research reports of the companies, I suggest my clients to take them under consideration from investment perspective for a specific duration of time or until there are any fundamental red flags visible in the company. I analyze the bond, currency, and special commodity market to hedge the portfolio of the clients.

Furthermore, since last 3 years, portfolios under my management have outperformed the balanced benchmark index in India by around 30%. I am a proactive and deadline driven finance professional with excellent communication and analytical skills.

Moreover, I would describe myself as someone who has a proven ability to perform financial modeling, and analysis to produce time sensitive investment research reports. This breadth of work experience endowed me with extensive fundamental and technical analytical skills as well as client management skills. To add to it, I am 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. I hope to have the opportunity further to cultivate these skills at your firm.

Lastly, I am planning to enrol in CFA level 1 certification course and complete my CFA certification in coming years.

I sincerely acknowledge and am grateful for your time and consideration.

Yours truly,
Mehul Patel