

Parth Kabrawala

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<https://github.com/Parth38k/Parth-s-Projects>

EDUCATION

University of Birmingham- MSc Investments	Sept 2025 – Present
• Asset Management Department- Report on Palantir Technologies.	
Chartered Financial Analyst (CFA institute – USA) Level-2	May 2024 – Present
• Applied financial modelling and data interpretation skills to assess asset performance across 4 to 5 sectors.	
• Cleared both CFA levels I and II on the 1 st attempt.	
• Developed strong expertise in investment analysis, equity valuation, portfolio management, and ethical standards	
Chartered Accountant (Institute of Chartered Accountants of India)	June 2021 – Oct 2024
Intermediate Level	
• Equivalent to ACCA (UK) 5 papers.	
• Accounting, Taxation, Auditing and Corporate Laws.	
• Passed both the levels in 1 st attempt.	
Bachelors of Commerce – Veer Narmad South Gujarat University	June 2021 – April 2024
• Pursued a comprehensive undergraduate program with a focus on accounting, finance, and business management.	
• Built a strong foundation in financial reporting, taxation, auditing, and corporate law.	

WORK EXPERIENCE

Sanghvi Wealth Management, Surat, India – Equity Research Analyst	Jul 2024 – Jan 2025
• Monitored global events and market trends to support investment decisions for portfolios totalling £17M in AUM, delivering actionable recommendations to clients.	
• Analysed industries including banking, FMCG, and energy to identify market drivers and investment opportunities	
• Built and maintained valuation models (DCF, relative, and sensitivity analyses) to forecast company earnings and assess investment potential.	
Sonali Dalal & Co., Surat, India – Articled Assistant	Jan 2023 – Jan 2024
• Facilitated in statutory, internal, and tax audits for corporate and individual clients, ensuring compliance with accounting and tax regulations.	
• Prepared and executed over 100 tax and GST returns, ensuring 100% compliance with filing deadlines.	
• Collaborated with senior auditors to review financial statements and identify key areas for improvement.	
• Maintained and reconciled financial records for 10+ corporate clients, improving accuracy and reporting efficiency.	
• Managed around 20 overall client accounts and deadlines efficiently, maintaining strong attention to detail and professional communication.	

EXTRACURRICULAR

- Python Programming (CFA institute) – Made projects on Time series analysis
- Bank of America- Investment Banking stimulation
- Birmingham Investment and Finance Society – Asset Management Division (prepared an equity research report on Palantir Technologies)
- Delivered a keynote speech before 1,000+ professionals at the CA Mega Conference.
- Financial Modelling (CFA institute)
- Management and communication course (CA institute)
- Advanced IT course (CA institute)

SKILLS & INTERESTS

Languages: English (Fluent), Hindi (Fluent), Gujarati (Fluent)

Skills: Three statement analysis, Tax-Filing, Equity Research, Microsoft Excel & Power BI.

Interests: Following global financial markets, writing blogs, volunteering within student communities, and exploring economic trends.