

# Parth Kabrawala

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## EDUCATION

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- 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<sup>st</sup> 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<sup>st</sup> 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

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- 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

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- 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

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

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

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