

Parvaiz Mansoori, CFA

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Work Experience

A-One Jewels

Hong Kong SAR, Mumbai | June 2019 – June 2024

Analyst

- Advised clients on investment strategies, asset allocation, and long-term financial planning based on goals
- Built and maintained financial models to project cash flows, retirement scenarios, tax-optimized investment strategies.
- Conducted fundamental research on equities, mutual funds, and ETFs to provide actionable investment recommendations.
- Built real estate financial models and analyzed properties for capital appreciation and cash inflows.

The Starter Labs

Mumbai, India | Jan 2019 – Apr 2019

Digital Marketing Specialist

- Wrote ad copy, set up Facebook Pixel and campaigns for clients from diverse industries.
- Conducted A/B testing on creatives and copy to improve engagement.
- Used Facebook Pixel and Google Tag Manager to track conversions, improve retargeting, and optimize cost per acquisition.

Education

CFA Institute

| 2019 – 2022

Chartered Financial Analyst – CFA® Charterholder

Member of CFA Society New York (1540 Broadway)

Passed all 3 levels of the exam on the first attempt

University of Mumbai – UPG College of Management

Mumbai, India | 2015 – 2018

Bachelor of Management Studies – Specialization in Finance

Relevant Coursework: Business Economics, Financial Accounting, Corporate Finance, Strategic Financial Management, Taxation, Business Law, International Finance, Investment Analysis and Portfolio Management

Certifications

- Data Science Professional Certificate – IBM.
- Data Analytics Professional Certificate – Google.
- Investment Foundations Certificate – CFA Institute.
- Financial Markets Course – Yale University.

Additional Information

Languages: Fluent in English and Hindi; Conversational Spanish.

Interests: Mixed Martial Arts, Fitness