

APOORVA VATS

apoorva_vats@yahoo.in | +91-9999972967

Summary Competent individual with zeal for learning, robust mathematical foundation, excellent analytical competency and passion for portfolio management. Profound knowledge of derivatives and options, technical analysis, investment analysis, equity research and portfolio management. Expert user of Microsoft Excel, PowerPoint and Word. Excellent communication skills and strong command over English, Hindi and Punjabi.

Objective To acquire a position in a dynamic and fast-paced environment with growth opportunities, highly ethical practices and respect for team effort.

Highlights Superior research skills Expert Microsoft Office User
Technical Analysis Excellent Communication skills
Derivatives Superior Time Management
NSE Certified Market Professional Level 3

Experience *Wealth Manager, Bellwether Advisory LLP* **Feb 2014 –**

Financial Planning, Plan Execution, Research on Equities and Mutual Funds, Mutual Funds and Equity Advisory Services, Risk Advisory, Liability Management/Loan Advisory, Tax Planning and Real Estate Advisory.

- Client acquisition and retention □
- Portfolio management and restructuring□
- Goal based investment alignment□
- Debt Restructuring□

Nodal Executive, Reliance Communications **Mar 2012 – Jul 2012**
Coordinating with Law Enforcement Agencies and providing technical assistance. Handling Judicial matters, processing Call Detail Records and Call Monitoring

Project Engineer, RefAir Technical Services **Mar 2009 – Feb 2012** Planning, scheduling, conducting, coordinating and execution of projects pertaining to precision AC units, extensive regular contact with assigned project Clients, budget monitoring and trend tracking, Participating in Client/contractor meetings and resolving Client/engineering and management project issues.

Education *Masters, Business Administration (Financial Markets)* **Aug 2012 – Jun 2014**

University School, GGS Indraprastha University, India

- Specialization course in Financial Markets in collaboration with National Stock

□ Exchange, India. □

- Major in “Corporate Valuation”. □

□

- Internship at State Bank of India. The scope of the internship was to study the reasons for slow pick up of Recurring Deposit Scheme of SBI. □

Bachelors, B.Tech, Electronics and Communication **Aug 2004 – Jun 2008**
Shaheed Udham Singh College of Engineering and Technology, Tangori,
Punjab Technical University

Apr 2002 – Mar 2004 Ganga

Secondary, Science (Mathematics)
St. Francis De Sales School, New Delhi (C.B.S.E)

Mar 2001

Certifications → Successfully completed National Stock Exchange's Certifications;

- Financial Markets □□ Capital Market Operations
- Mutual Funds □ Investment Analysis and
- Equity Derivatives Portfolio Management
- Currency Derivatives □ Commodity Markets
- Equity Derivatives Market Operations □ Equity Research
- Interest Rate Derivatives □ Regulatory Framework in
- Financial Valuation and Security Market
- Modeling □ Technical Analysis

→ Certification in Sales and Marketing from Department of Management Studies, IIT, Delhi

Additional D.O.B: 17th June, 1985
 Gender: Male
 Religious View: Hinduism
 Permanent Address: 121-B, GH-10, Sunder Apartments, Paschim Vihar,
 New Delhi-110087, Near Radisson Blu, Paschim Vihar
 Hobbies: Playing Table tennis, Lawn tennis, reading and listening to
 music

References Col. Anil Kumar Sachdeva

Nodal Officer,
Reliance Communications
+91-9350-888222

Siddharth Prasai

Wealth Manager
Bellwether Wealth Advisory
+91-8377-892919

I hereby declare that all the information provided above are true. If found and proven otherwise, I accept all consequences and any penal actions thereafter.