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LinkedIn

VATSAL ASHAR

INVESTMENT BANKING ANALYST

SUMMARY

Seeking a challenging role in Investment Banking, utilizing my experience in relationship management, passion for preparing pitch decks, conducting research, financial analysis, and supporting end-to-end transactions.

KEYSKILLS

- Pitch Deck Preparation
- Research and Analysis
- Client Communication
- Financial Analysis
- Due Diligence process
- Data Extraction and Analysis
- Financial Models, Excel & Power point
- Networking
- Financial Statement
- Extracting Data

Achievements

- Received Merit cum need scholarship for under graduation
- Secured third place at National level research conference on research paper presentation.
- Received Merit cum need scholarship under graduationegic planning

Extra Curricular activities

- Researched and presented a paper on the practicality of Bhagvad Gita
- Led the KES team for public speaking events during the exchange program.
- Participated in 10-day exchange program at MSU, Baroda attending diverse events
- Participated in entrepreneurial carnival 2020, installed stalls to imbibe entrepreneurial values.

Projects & Case Studies

- Developed case study on **PNB's AML measures**, demonstrating expertise in financial analysis and risk management.
- Executed financial models, including **DCF, LBO, and M&A**, to evaluate investments and support strategic decisions.

Relationship Manager

Mar '22

WealthKare | Ahmedabad

- Assess client's financials and strategize **customized solutions** for **tax planning, retirement planning, and overall financial planning**.
- Examining client profile, identify their needs, recommend & present financial product. design **fully tailored goal-based plan**.
- Strengthened **networking and public speaking skills** by actively engaging in weekly BNI meetings.
- Streamlined **KYC compliance**, account opening, registration, mandate & app management queries
- Checking client's **renewals, cross selling** of insurance products, suggesting latest alternative **investment options** to the client.

SALES OFFICER

Oct '21 - Jan '22

HDFC BANK | Jamnagar

- Enhanced brand promoter and vendor relationships, **providing customized credit solutions to their end-clients**.
- Managed and oversaw credit reports, **audited KYC documents**, and **conducted due diligence** for commercial and consumer clients.

INTERNSHIP

Jan 2020-Mar 2020

Jan '20 - Mar '20

VND WEALTH | Mumbai

- **Conducted surveys** to understand financial literacy among people of Mumbai (Sub-urban)
- **Analyzed** comprehensively the financial behaviors data collected from our survey.

EDUCATION:

P.G Diploma in Investment Banking

Jul '22 - Mar '23

London Governance and Compliance Academy

Scored an average of 93% across first, mid and final term examination.

Bachelor of Management studies (Finance)

Jul '18 - Jul '21

KES Shroff college | Mumbai

Achieved excellent academic performance in the final semester of UG, earning a remarkable **score of 89%**.

HSC

Jul '18 - Jul '21

Air Force School | Jamnagar

Acknowledged for outstanding academic achievement in HSC, ranking among the **top performers** in the school with a **score of 84%**.