

# Neelam N Dharamshi

F/336, Sagar Park, Amrut Nagar,  
Ghatkopar (W), Mumbai 400086

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## **Objective:**

**Focused, analytical and quick thinking finance professional with strong communication skills and ability to comprehend, translate and act upon financial data.**

**Certified Credit Research Analyst (CCRA)** Candidate, passed Level 1 and currently in pursuit of Level 2.

## **Work Experience:**

**CREDIT SUISSE BUSINESS ANALYTICS (MUMBAI) (JULY 2013 TO OCTOBER 2013)**

**Consultant in Private Banking and global Research (On Contract Role for a flagship project)**

**Project on The role of Corporate Governance on the financial performance of family-influenced businesses in Asia.**

### **Job Responsibilities:**

- Analyses of Asian company's annual reports to find out Corporate Governance variables of the 2011 Asian family businesses relative to a representative sample of their respective domestic markets.
  - To analyze the impact of corporate governance on the financial performance of family influenced business.
  - Research work related to global Debt market and Equity from Bloomberg, Factset and Data Stream.
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**HELIOS CAPITAL ADVISORS PRIVATE LIMITED (MUMBAI) (MARCH 2012 TO JANUARY 2013)**

**Business Associate in Corporate Finance**

### **Job Responsibilities:**

- Interacting with the clients, understanding their requirements for debt syndication and Setup meetings and conferences.
  - Liaisoning with the clients for collating data required for preparation and submission of the proposal with Banks/FIs.
  - Structuring the proposal and preparing Information Memorandum, Term sheet, Request letters and other documents pertaining to the proposal for submission to Banks and NBFCs.
  - Evaluating financial reports such as Balance sheet, Profit & loss account and other financial statements for investment decisions of companies across various sectors like Real Estate, Pharmaceuticals, Media, Manufacturing etc. and maintaining database of companies in excel.
  - Dealing with Companies, Banks, Mutual funds, Insurance companies and other investors for primary placement of Commercial papers & NCDs and maintaining relationships with them.
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**TWENTYFIRST CENTURY SHARES & SECURITIES LIMITED (MUMBAI) (Oct 2011 to Jan 2012)**

**Executive Trainee in Wholesale Debt Market**

### **Job Responsibilities:**

- Dealing in G-Secs, CDs, CPs, Bonds & Treasury bills.
  - Maintaining relationships with Banks, Mutual funds & other financial institutions.
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**PRIYADARSHINI & CO. CHARTERED ACCOUNTANTS (MUMBAI) (April to December 2008)**

### **Job Responsibilities:**

- Audit of Individuals, HUF's & Firms, MVAT Audit of Individuals & Firms.
  - Compilation & filing of MVAT Returns, Taxation of Non Corporate Entities, Preparation of returns of Individuals, HUF and Firms.
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**Academic Achievements:**

QUALIFICATION	INSTITUTION	BOARD/ UNIVERSITY	YEAR OF PASSING	PERCENTAGE (%)
CCRA Level 1 (Certified Credit Research Analyst) 1 <sup>st</sup> Attempt	Association Of International Wealth Management Of India (AIWMI)	-	2014	50%
MBA/MMS (Finance Specialization)	Shah & Anchor Kutchhi Engineering College (Department of Management studies)	Mumbai University	2011	73.75
B.COM.	K. J. Somaiya College of Arts & Commerce	Mumbai University	2008	67.86
H.S.C	K. J. Somaiya College of Arts & Commerce	Maharashtra Board	2005	78.83
S.S.C	S.V.D.D English High School	Maharashtra Board	2003	77.33

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**Software/Technology Proficiencies:** Bloomberg, Reuters, MS Word, PowerPoint, Excel, Outlook

**Summer Project at Bank of Baroda, Treasury Mumbai (May to July 2010)**

**Title of the project: “Growth & Scope of Forex Market in India & linkages with other markets.”**

- Understanding of integrated treasury department, dynamics of forex market and analysis of various factors affecting the exchange rates.
- Knowledge of the hedging tools used in foreign exchange.
- Effects of linkage of foreign exchange market with other markets & analysis of the correlation between USD/INR and other main currencies.

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**Personal Dossier:**

- Date of Birth : 20th December, 1987
  - Marital Status : Single
  - Hobbies : Reading, Travelling, Music.
  - Languages Known : English, Hindi, Gujarati, Marathi and German(basic)
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