

Neelam N Dharamshi

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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.

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.

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 st 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 |

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.

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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