

AAKASH JAIN, CFA

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PROFILE

Chartered Financial Analyst (CFA) and Analytics Program Manager with over **4 years** of experience driving AI transformation, cross-functional program delivery, and data-driven decision-making in global financial services. Proven track record of **leading enterprise-wide initiatives**, securing **multi-million-dollar client wins**, and enabling adoption of next-generation analytics platforms. Adept at bridging business strategy with technical execution to deliver measurable results, optimize processes, and enhance stakeholder engagement.

WORK EXPERIENCE

Analytics Program Manager – Product | MSCI Inc.

Feb 2025 to Present

MSCI Inc. is a leading provider of critical decision support tools and services for the global investment community. With a range of products and services that include indexes, ESG (Environmental, Social, and Governance) research, analytics, and real estate benchmarks, MSCI helps clients make better investment decisions.

- **Lead AI goal alignment across 10 Analytics teams**, achieving 100% adoption of measurable goals and delivering monthly progress reviews that accelerated MSCI's AI-first adoption strategy.
- Orchestrated cross-functional deployment of **Barra on Google Cloud Platform (GCP)**, completing regression, UI, and BDT testing ahead of deadlines, ensuring seamless production readiness.
- Spearhead the Project Management of **decommissioning of legacy Simulation and Risk Visualization components** to improve platform experience and reduce maintenance overhead.
- **Process Improvement of Analytics release notes** by collaborating with Client Service and Coverage teams, identifying gaps, and improving templates for better stakeholder awareness.
- Provide strategic and operational support to Analytics leadership on planning, performance tracking, and team-wide initiatives.

Global RFP analyst – Global Coverage | MSCI Inc.

May 2023 to Feb 2025

- Contributed as a vital member of the RFP team, serving as a **liaison between product development and sales departments**. Specialised in offering expertise across ESG, index, analytics, and real estate products.
- Facilitated the **successful acquisition of a contract with a prominent American company boasting assets under management exceeding USD 1.2 trillion, for equity index** within set timelines and guidelines of the client.
- Collaborated with a diverse cross-functional teams comprising research, product, and sales to drive revenue generation initiatives.
- Crafted compelling and comprehensive RFP responses tailored to client requirements, ensuring accuracy, clarity, and alignment with organisational objectives. Incorporated the responses into the directory for future referencing.
- Collaborated with 2 of team members on **AI initiative that would fetch and enhance client facing responses** from the directory.
- **Secured a contract with a leading bank with revenue inflow of 1.4 million USD.**

Morningstar, Inc. is a global financial services firm that provides independent investment research, data, and tools for investors. The company's offerings include comprehensive data on various investment products, portfolio management services, and investment research.

- Spearheaded the **management of corporate event data, encompassing spin offs, mergers, acquisitions, rights offering, dividends and stock splits**, to ensure timely and accurate portfolio level information dissemination to clients.
- Applied advanced data analysis techniques to assess the impact of corporate events on investment portfolios and financial markets, facilitating informed decision-making processes of clients with respect to benchmark calculated by Morningstar.
- Conducted **comprehensive research and root cause analysis to swiftly identify and resolve discrepancies inherent in corporate event data sets** due to FX conversion factor, mismatch in holiday calendar as well as security being listed in multiple exchanges.
- **Produced detailed reports and dynamic presentations** elucidating the implications of corporate events on client portfolios and investment strategies, fostering greater transparency and strategic alignment throughout development and research teams.
- Orchestrated seamless collaboration across multifunctional teams to optimise processes and meet stringent deadlines associated with corporate event arising due to global nature of exchange's closing times for USA and EMEA regions.
- Recognised for delivery excellence, having received **two awards** for outstanding performance

EDUCATION & QUALIFICATIONS

CFA Institute – Chartered Financial Analyst (CFA)	2022 - 2024
Thakur Global Business School – Post-graduate Diploma – Finance	2020 - 2022
Thakur College of Science and Commerce – Bachelor's degree – Finance	2017 - 2020

IT Skills

- Microsoft Excel and Word
- Jira and Confluence
- Sequential Query language (SQL)

INTERESTS

Physical Fitness Enthusiast.