

## Aashna Rumit Shah

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### EDUCATION

#### University of Massachusetts Amherst - Isenberg School of Management

Dual Degree: BBA in Finance (Financial Analyst Concentration) and BSc in Managerial Economics

Amherst, MA, USA

Candidate, May 2026

- Cumulative GPA: 3.96/4.0; Dean's List (All Semesters)
- Recipient of the Chancellor's Scholarship Award (\$16,000/year)
- Lead Teaching Assistant: Business Communication Transitions (Spring & Fall 2025) and Fundamentals of Marketing (Fall 2025)

### WORK EXPERIENCE

#### Cloud 9 Investments / Willets Group

Private Equity Intern (6-Month Co-op)

Remote – NYC, USA

June 2025 – Present

- Conducted in-depth research on 30+ technology companies across AI, data centers, hyperscalers, SaaS, MaaS and fintech (e.g., Republic, Kandou, Astera Labs, AppLovin), building detailed company profiles and financial analysis using their 10-K and S-1s to identify potential partnerships, integrations, and acquisition targets
- Presented weekly research findings directly to the CEO and senior leadership, shaping investment theses and contributing to strategic discussions on high-growth technology opportunities; participated in client and management calls with firms such as DialedIn and Capitex to strengthen due diligence and refine deal analysis
- Supported live deal evaluation including Gupshup's integration with Saudi Arabia's MEP (Vision 2030 initiative) and potential funding for SMCS & Compliance Grid (South Africa); contributing to strategic positioning, financial projections, and investment memos to inform capital deployment decisions

#### Deloitte Touche Tohmatsu Limited

Mergers and Acquisitions Intern in the Strategy, Risk, and Transactions Department

Mumbai, India

June 2024 – August 2024

- Facilitated research and built datasets covering 25+ companies across personal care, animal healthcare, automotive, and private equity industries to identify potential investment opportunities; streamlined outreach strategy for analysts by flagging businesses with deal potential above \$1M in transaction value
- Developed and refined pitch books, industry overview decks, and datasets including a comprehensive study on the Indian semiconductor industry, highlighting growth drivers such as Tata & TSMCs public-private partnership; insights were leveraged by senior bankers to assess client positioning and strengthen go-to-market strategies
- Worked with 2+ cross-functional teams within Deloitte's Strategy, Risk & Transactions department supporting analysts and senior stakeholders on live deals across multiple sectors; contributed to research and financial modeling risk assessments, while ensuring quality delivery of client-ready materials

#### Moneybee Investment Advisors Pvt. Ltd.

Equity Research and Investment Banking Intern

Mumbai, India

June 2023 – August 2023

- Conducted active research on 15+ companies in oil & gas, pharma, energy, welding, and F&B industries, analyzing financial statements, annual reports, and concalls; built valuation models on Excel using firm templates, gaining exposure to P/E, EV/EBITDA, and other key multiples
- Supported due diligence and portfolio analysis by presenting findings of 10 pages of report to senior leadership to evaluate whether companies were suitable additions to the firm's public equities portfolio
- Observed client meetings in the investment banking arm, gaining early exposure to M&A deal structuring through compliance reviews

### EXTRACURRICULAR EXPERIENCE

#### Minutemen International Equity Fund (MIEF)

Senior Analyst

Amherst, MA, USA

April 2025 – Present

- Led a team of 3 junior analysts to develop investment thesis and financial models for EssilorLuxottica (ESLOF) and Zota Healthcare (ZOTA), guiding research and presenting strategy to fund stakeholders, achieving a 15.4% return on the fund's portfolio within 4 months (ESLOF)
- Pitched investment strategies for global equities (ESLOF, VRTX, SanFu Chemical) based on long-term valuation models including DCF and trading comps models using Bloomberg and Excel; presented insights at bi-weekly fund meetings and workshops to refine valuation and financial analysis skills

October 2024 – April 2025

#### Isenberg Business Ethics Team

Participant

Amherst, MA, USA

September 2022 – Present

- Led a team of 5 people to win the 2nd place at IBECC 2023 with a case study on AI in agriculture
- Participated in 4 ethics debate competitions (Ethics Bowl), delivering strategic case presentations on ethical issues involving AI, animal welfare, and human rights, and competing against 10+ universities

### SKILLS & CERTIFICATIONS

**Computer:** Microsoft Word (Proficient), Excel (Proficient), PowerPoint (Proficient), Python (Basic), SQL (Basic)

**Certificates:** JP Morgan Investment Banking Simulation by Forage, Bloomberg Market Concepts, Financial Markets by Yale University, Isenberg Advanced Excel User Badge, Speech & Debate Course on Ethics and Human Rights by Harvard & Stanford University

**Languages:** Proficient in English and Hindi; Conversational in Gujarati

**Interests:** Debating (University club), Badminton (Twice a week), Pickleball, Dancing (Indian Classical), Cooking