

Shubham Tamrakar, CFA

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ACADEMIC QUALIFICATIONS

| Qualification | Institute | Board / University | Year |
|----------------|--|--------------------|------|
| B.COM | Shri Atal Bihari Vajpayee Government Arts and Commerce College, Indore | DAVV, Indore | 2021 |
| XII (Commerce) | Govt Higher Secondary School | MPSE Board | 2018 |
| X | Govt Model Higher Secondary School | MPSE Board | 2016 |

OTHER PROFESSIONAL COURSES

| Course | Institute | Year |
|--|--|------|
| CFA Level III – Specialisation, Portfolio Management | CFA Institute - USA | 2025 |
| CFA Level II (90+ percentage) | CFA Institute - USA | 2024 |
| CFA Level I (90+ percentage) | CFA Institute - USA | 2023 |
| GGI Impact Lab – Young Leader Program 2023 | Global Governance Initiative | 2023 |
| Financial Modelling and Markets | Maheshwari Institute Career and Research, Indore | 2019 |

PROFESSIONAL EXPERIENCE

Alturas Investment Management Pvt Limited, Manager of Alturas India Fund, CAT III AIF

August 2024 – Present

Analyst - Research & Investments

- Conducted end-to-end investment research from screening companies to deep-dive analysis of financials, business risks, competitive dynamics, and management interactions to identify high-quality businesses aligned with the fund's mandate.
- Tracked portfolio companies closely and provided actionable insights on portfolio positioning, risk management, and periodic rebalancing to optimise returns.
- Supported fund operations and compliance by coordinating with trustees, tax advisors, legal and compliance partners, and managing SEBI-related processes; gained hands-on experience in launching and running an AIF from Day 0.

Churchgate Advisory Private Limited

January 2023 – September 2023

Investor Relations Associate

- Managed financial communications by preparing quarterly/annual results, investor reports, and presentations, ensuring accuracy, regulatory compliance, and clear messaging for analysts and shareholders.
- Led investor relations materials and insights through industry research, peer benchmarking, and analysis of market/analyst feedback to strengthen management's communication strategy and investor positioning.
- Coordinated across finance, strategy, and senior leadership teams for earnings calls, investor meetings, and roadshows, while addressing investor queries with timely, data-driven responses.

Sig Sigma Consultant

November 2019 – July 2022

Research Analyst – Currency (Forex)

- Performed in-depth research and quantitative analysis of major and cross-currency pairs to identify trading opportunities and manage FX risk.
- Generated trade ideas and recommendations by integrating technical indicators, chart patterns, and fundamental macroeconomic insights.
- Monitored real-time market movements and macro events, delivering daily and weekly market outlooks with actionable strategies for portfolio managers and clients.

LEADERSHIP & COMPETITIVE ACHIEVEMENTS

- Selected for the Startup India Project under the Young Global Leaders Program, Global Governance Initiative.
- Achieved National Finalist position in Finopoly at Atharv Ranbhoomi 2024, organised by IIM Indore.
- Participated in Chanakyaneeti 4.0 – Finance-Based Quiz Competition organised by Aswini Bajaj.

CERTIFICATION

- CFA Investment Foundation
- NISM-XV: Equity Research Analyst
- NISM-XA and XB: Investment Advisor Level 1 & 2
- NISM-VIII: Equity Derivatives

SKILLS AND INTERESTS

- Skills:** Analytical thinking, financial analysis, investment research, tools & software, communication skills.
- Hobbies & Interests:** Running, Reading, Writing, Hiking and Badminton.