



# Anvesh Dhagat, Senior Financial Analyst

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## DETAILS

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## PROFILE

A naturally diligent, conscientious and detail focused finance professional with 6 years of experience in finance and operational management, leveraging CFA (Level 2) and MBA(Finance) credentials.

I am adept at financial analysis, excel modeling, market report writing, identifying new market opportunities and implementing internal controls to ensure adherence to compliance whilst minimizing business risk.

## EMPLOYMENT HISTORY

### Senior Financial Analyst, Aon Consulting Private Limited

Mar 2018 — Present, Bangalore

#### *Outline*

Supported the Aon's Global Rating Agency and Advisory teams in US, UK, EMEA and APAC with financial analysis, modeling and reports directly used by brokers and clients for strategic decisions.

#### *Key Deliverables*

- Initiated new business opportunity for Aon Asia's strategic growth by identifying capital constrained companies for capital relief solutions.
- Responsible for Market report writing – Detailed quantitative/qualitative reports on reinsurance writing groups, operating companies which helps the insurance companies, brokers for picking reinsurance companies.
- Have worked in London headquarters on Llyod's Syndicates and trained the Capital advisory London team on S&P capital model and AM Best Universal model.
- Business partnered with various cross-functional teams to drive automation of securities weekly reports as well as providing training and development for the team.
- Carried out Capital Adequacy Model for Aon's market making activities: Model that compares the risk-based required capital to the company's actual capital as of a certain point in time.
- Built new models for different regions and insurance industries and added new features to existing models to make them more robust with the help of advanced excel formulae and macros.
- Ideated changes in Aon's Market Analysis portal, used by more than 2500 clients providing reinsurance market, updates on topics of interest, such as real-time rating feeds, earning releases news, and M&A and new company formations.
- Coordinated with in-house Analytics Product Development team to create tool for premium and loss analysis – Model which analyzes market share, growth and loss ratio performance relative to industry by line of business and by state.
- Prepared investor discussion material slides used by top management and in board meetings.
- Created Client Planning reports for Asian companies used by brokers for market making activities.

## SKILLS

Experienced in writing detailed profile reports on reinsurance-writing groups and operating companies.

Practical experience in performing business research using reputed global secondary research sources such as Bloomberg, SNL, AM Best and S&P Global Credit Portal

Strong engagement, presentation, and communication skills

Financial modeling, scenario analysis, capital adequacy & allocation and other analyses directly used by top level management

Acquired In-depth knowledge of the performance measures and the technical aspects of risk selection of a (re)insurance company

Analysis of financial statement in US statutory/GAAP/IFRS

Proficient in MS Excel and PowerPoint

Ability to drive a team and stakeholder management

Acquiring skills on excel VBA

## **Assistant Manager, HSBC**

Sep 2015 — Feb 2018, Bangalore

### *Outline*

Supported the Global Banking and Market, Investment banking division with day to day trading and transaction activities; dealt with products and services including financing, prime services, research and analysis for clients.

### *Key Deliverables*

- Effectively migrated the global legal on-boarding documentation to the Indian office.
- Responsible for on-boarding of sub-funds for HSBC's Strategic & Non-Strategic Clients on HSBC's balance sheet in UK/European region, dealing in products like FX/Derivatives/Equities and Fixed Income.
- Expedite client trading account on new sub-funds, products by liaising between onshore and offshore stakeholders.
- Have worked with the remote teams across various geographical areas to provide professional client service excellence.
- Ensured process compliance as per the regulatory guidelines and audit requirements.
- Worked in collaboration with onshore stakeholders to identify and exploit opportunities for effective migration of processes.
- Strong management skills to complete complex, business-critical tasks within pressured timescales ensuring the team meets all target SLA's.
- Contribute to a supportive and proactive working culture by sharing knowledge and expertise with other team members and providing training to colleagues when necessary.

## **EDUCATION**

### **Chartered Financial Analyst**

Dec 2018 — Present

CFA Institute is a global association of investment professionals, have cleared CFA Level 2 and pursuing for other levels.

### **Sri Sathya Sai Institute of Higher Learning, Master of Business Administration (Finance)**

Apr 2013 — Apr 2015

Key Electives: Project Finance and Control, Corporate Financial Strategy Mergers and Acquisitions, Business Analytics and Business Intelligence.

### **Sri Sathya Sai Institute of Higher Learning, Bachelor of commerce (Hons.)**

Apr 2010 — Apr 2013

## **INTERNATIONAL PUBLICATIONS**

### **Amity Journal of Finance**

#### Measurement of Foreign Exchange Exposure on Selected Indian Firms

The objective of this study was to measure and identify determinants of foreign exchange exposure for non-financial Indian firms