



## Contact

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## Education

Aug 2023

CISI - International Certification in  
Wealth & Investment Management

Feb 2021

Chartered Financial Analyst (CFA)

Jan 2019

Financial Risk Manager (FRM)

Apr 2017

Association of Chartered Certified  
Accountants (ACCA)

Jun 2013

Middlesex University, Dubai, UAE

BA Honors in Accounting and Finance

## Skills

- Private Banking
- Portfolio Consolidation
- Portfolio Management
- Investment Advisory
- Risk Management
- Structured Products
- Bloomberg Terminal
- Microsoft Excel

# Darshit J Ravani

CFA, FRM, ACCA, ICWIM

With over 10 years of experience in investment advisory and accountancy, I am a seasoned professional with multiple credentials. With a proven track record of delivering high-quality financial & investment advices and solutions to clients across various sectors & markets, leveraging my strong analytical, communication, and interpersonal skills. Furthermore, I extend my knowledge & experience by teaching risk management & investment analysis.

## Experience

### Middlesex University | Dubai

Jan 20 - Present

#### Adjunct Faculty - Msc Banking and Finance

- Delivery of the module **International Risk Management** (FIN4480) through lectures, seminars, workshops and tutorials. To give advice and guidance to students to support their academic progress through the University. Liase with and assist others in the administration and management of relevant subjects and programmes.

### PwC Academy Middle East | Dubai

Feb 24 - Present

#### CFA Lecturer - Part Time

- Delivering **CFA lectures** on various subjects across all the levels.

### Avighna Investments | Dubai

Oct 23 - Dec 23

#### Investment Consultant

- Managing a **multi asset portfolio** consisting of Fixed Income Bonds, Equities, Mutual Funds (Bonds), Structured Products (CLN, GRC, Deaccumulator), Derivatives (Interest Rate Swaps), Money Market Deposit, etc. **Total AUM \$1 Bil.** Providing a consolidated position of assets parked across various private banks.

### Emirates NBD | Dubai

May 23 - Oct 23

#### Relationship Manager

- Deep understanding of financial markets, **investment products**, and wealth management strategies. Strong entrepreneurial mindset with the ability to identify and **seize business opportunities**. Excellent communication and interpersonal skills to build trust and **rapport with clients**.

### First Global Capital Limited | ADGM, Abu Dhabi

Dec 18 - Mar 23

#### Senior Manager - Investment Advisory

- Partnering with **Relationship Managers** to offer appropriate **investment solutions** to ultra/high net worth clients. Attracting/enhancing **high net worth client** relationships and profitability.
- Accountable for assessing client needs, developing a comprehensive **investment strategy**, co-ordinating sales and execution against that strategy, and monitoring the performance and appropriateness of the client's overall **investment portfolio**.
- Creating & implementing a strategic client **book development** plan with measurable actions. Complying with all regulation, policies and standards, contributing to an **effective risk culture**.

### Klay Capital | DIFC, Dubai

Jul 17 - Sep 18

#### Service Advisory Associate

- Providing fundamental **support** to the Team Heads/Relationship Manager(s) - [RM], Investment Managers (IM) to **assist in the day-to-day business activities** in all aspects of client servicing and operational support, as well travel arrangements for RM's.
- Acting as the **primary point of contact for RM and client** for all operational requests by liaising with key stakeholders. Responsible for **timely action** on requests and **issue resolution** to meet the client/RM requirements.

# Achievements

Managed the investment advisory desk independently for 6 months in the absence of CIO

Promoted twice in 3.5 years.

- **Sangani & Company Chartered Accountants** | Dubai **Aug 14 - Aug 16**  
**Senior Audit Associate**
  - Making constructive suggestions to improve client **internal controls** and accounting procedures. Performing overall **financial statements analysis**, computation of financial ratios and trend analysis. **Drafting** financial statements and **management recommendation letters**.
  - Conducting **AML audits** for reputed exchange houses. Performing **statutory audits** covering **several industries** including tires, metals, hotels and restaurants, textiles, laundry, etc.
- **Oman Ocean Trading LLC** | Dubai **Jul 13 - Jul 14**  
**Accountant**
  - **Recording** of daily transactions such as sales, purchases, receipts and payments, etc. in to Tally ERP.
  - **Summarizing** and preparing financial statements. Recording **fixed assets** acquisitions and dispositions and preparing depreciation schedule.
  - **Reviewing** invoices for appropriate documentation and approval prior to payment.