
AARTI SAGAR WALUNJ

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PROFILE

Total experience of 4 years 3 months. Experience in ESG Research- 3.8 years, Capital market & Trade settlement – 8 months. Passionate about business optimization and workflow improvements. Ready to take on new professional challenges with growth-oriented company.

CAREER SUMMARY

ESG Research Associate II - (Dec 2022- Present)

MORNINGSTAR INDIA PRIVATE LIMITED

- Conduct research, analysis, and rating based on a research methodology focused on environmental, social and governance topics aligned to EU Taxonomy.
- Identifying and analyzing financial statements of companies that generate revenues from products/services that are aligned with achieving Sustainable Development Goals by United Nations, EU Taxonomy.
- Quality review processes before the research delivery.
- To deliver individual and team targets, including production and quality
- Aided the team in resolving client queries,
- Closely work with the quality assurance, content, technical team to resolve client's data issues timely and effectively.
- Putting up methodological, content issue to the steering committee.
- Conduct onboarding and training of the project team on the research topic and methodology.
- To support Team Lead in responding to internal queries about research as necessary.
- To collaborate with internal stakeholders in the organization as necessary.

ESG Research Associate I - (Sep 2021- Dec 2022)

MORNINGSTAR INDIA PRIVATE LIMITED

- Sustainability research & analysis of companies across multiple sectors and industries on ESG indicators using comprehensive desk based research.
- Identifying and analyzing financial statements of companies that generate revenues from

- products/services that are aligned with achieving Sustainable Development Goals by United Nations,
- Screening annual reports, corporate websites, sustainability reports for relevant thematic involvement,
 - Drafting written assessments outlining nature of involvement, level of involvement, estimated or reported revenues and revenue analysis.
 - Closely work with the quality assurance, content, technical team to resolve client's data issues timely and effectively.
 - Putting up methodological, content issue to the steering committee.
 - Collaborated with the leadership team to identify relevant questions and determine best methods of collection.

Research Analyst - (Dec 2019 - Sep 2021)

SG Analytics Pvt. Ltd – Pune, Maharashtra

- Identify, aggregate, and analyze information for ESG indicators using reports like Annual Report, CSR Reports, Code of Conduct, legal documents, Company website, Bloomberg, Press Release, Stock Exchanges etc.
- Sustainability research & analysis of companies across multiple sectors on ESG indicators using comprehensive desk based research
- Perform controversy research including impact scoring & analysis
- Insert relevant corporate information in database
- Extract information on economic activity quantification from the company reports and insert the respective information in the database
- Researching and analyzing Corporate Actions that took place in the past 5 years
- Providing support and process feedback to business team for improvement streamlining the process which helps to improve the research
- Improving and changing the process as per the client's requirement

Career Break – (Feb 2017- Nov- 2019)- Maternity

Operations Executive - (June 2016– Jan 2017)

Bank of New York Mellon India – Pune, Maharashtra

- Reviewing & Payment of interest on Bonds, Release payments to bondholders, debentureholders (ABS & MBS) as per the related governing documents for all US Domestic Based Loans on pay date.
- Settlement of trade

- Identify exceptions & problems affecting funding of bonds on date and maturity period of bonds communicating it to management and assisting in their resolution, monitoring & helping update process improvement project of Debt Service Environment (DS)
- Co-ordination & follow-up with business team to resolve the various escalation and process issues.
- Maintaining Process error logs, Update tracker, daily /weekly / monthly Reports.
- Quality Check such as error finding, sorting errors

HANDS ON

- Mainframe/Citrix/Transtar/Orion
- Capture
- Probench
- Microsoft Office
- Internet & e-mailing/ Lotus notes
- Tally ERP 9

SKILLS

- Research Analysis
- Environmental, Social and Governance
- Detail Oriented
- Effective Communication

ACHIEVEMENTS

- Star of the Quarter Award (SEP 2022- Morningstar India Private Limited)
- Rising Star recognition (Sep 2016 BNY Mellon India)

EDUCATION

Exam	University	Name of School/College	Year of Passing	Percentage Obtained	Class Obtained
MBA Finance	Pune University	Sinhgad Institute of Business Administration & Computer Application	2016	Finance (67.67%)	First Class
B.com	Pune University	Huzurpaga Mahila Vanijya Mahavidyalaya	2012	64.58%	First Class
HSC	Maharashtra Board	H.H.C.P	2009	70.33%	First Class
SSC	Maharashtra Board	N.C.L English Medium School	2007	70.73%	First Class

HOBBIES

- Listening Music
- Watching Movies
- Painting

PERSONAL DETAILS

- Date of Birth :- 25th July 1990
- Marital Status :- Married
- Sex :- Female
- Languages known :- English, Hindi, Marathi
- Current Address :- 104- Fortune Empire, Near Seven Treats Restaurant, Z-corner, Keshav Nagar, Manjri BK, Pune-412307

Declaration:

I declare that, all the details furnished here are true.

Date:

Place: Pune

(Aarti Walunj)