

# MANSI JADHAV [Senior Analyst]

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## SUMMARY

As an experienced analyst in the financial services industry, I have a strong background in research, strategic planning, company profiling, Microsoft Office, and management. Additionally, I have extensive experience working with databases such as Preqin, Pitchbook, FactSet, CapIQ, Bloomberg, and others. I am also an expert in collecting data using qualitative, quantitative, and mixed methods and proficient in verifying, validating, documenting, and organizing data. I hold an MBA in Financial Management and Marketing from DAVV University, Indore. I have a 100% success rate in managing client deliverable deadlines, and I have gained broad experience in various sectors such as financial services, banking and manufacturing. I have also performed research and financial analysis. I had started managing a small team of three analysts, which allowed me to enhance my management skills and ability to lead a team. Overall, I am a strong research professional with diverse experience and a proven track record of delivering high-quality results.

## WORK EXPERIENCE

### Tresvista Financial Services Pvt. Ltd.

**Pune, MH**

*Senior Analyst*

*August 2020 - July 2023*

- Initiating projects by defining scope, tasks, and timelines, and identifying and managing deliverables for various Financial and non financial projects for Private Equity clients
- Delivering diversified projects including Financial analysis, research, newsletters, company profiling, and data transcription for Private Equity firms.
- Connecting with clients every day for project progress, estimation, and execution.
- Conducting financial research, analyzing market information data for clients using various databases like Preqin, Factset, Pitchbook, as well as other publicly available web information, and sourcing prospects such as financial institutions (FIS/Non-FIS/Companies/Contacts) to compile lists of potential leads.
- Creating Excel reports and Powerpoint Presentations.
- Performing QA/QC and Training the team of 3 for different deliverables, and firm policies and procedures for everyday project executions.

### Welspun India Limited

**Vapi, GJ**

*Officer*

*March 2019 - August 2020*

- Processed entries in SAP for documents realization and lodgment for profit and loss and balance sheets and coordinated with the bank.
- Verifying, validating, documenting, and organizing data to ensure accuracy and completeness.
- Coordinated with the Marketing team to develop strategies for developing market and management.
- Evaluated and helped with the recruitment and training process for new employees.

### S&P Global Market Intelligence

**Ahmedabad, GJ**

*Data Analyst*

*September 2017 – March 2019*

- Content writing for multiple clients and research through various databases.
- Client engagement to understand the unique requirements of clients and tailor solutions accordingly for each project to foster and maintain client relationships.
- Working on Inhouse database CapIQ with quarries and data updating for client deliverable with success rate of 97%.

### Jaro Education

**Mumbai, MH**

*Asst. Manager, Sales*

*September 2017 – March 2019*

- Identifying potential clients and lead generation.
- Connecting with clients and pitching and providing counseling.
- Achieving enrollment target.

## LEADERSHIP EXPERIENCE

- Core Committee member responsible for all the team engagement activities and outings
- Core committee member of the international club for running at Tresvista for multiple years
- Worked as a Video Jockey where i worked as an individual responsible for content writing, proofreading and present as an anchor which made me gain extensive knowledge in Media also helped me build confidence and communication

## EDUCATION

**Devi Ahilya University (AFMR)**

*Masters in Business Administration in Finance and Marketing*

**Indore, MP**

*Graduation Date: Aug 2017*

## Certification

Communication with Empathy | Scrum Master | Leadership for positive change

## SKILLS & INTERESTS

**Skills:** Project Management | Content Writing | Team Management | MS Office | Professional Communication | Presentation | Decision Making | Training and Development | Engagement Management | Stakeholder's Management | Market Research | CRM

**Interests:** Marketing & Recruitment, Public Speaking, Career Consulting, Creative Ideations, Brainstorming, People's Management, Business Development