Career Objective

I want a highly rewarding career where I can use my skills and knowledge to help the company and my coworkers to be successful. I am seeking for a challenging and interesting role related to analysis where my experience and knowledge can be utilized and enhanced. I am seeking a competitive and challenging environment where I can serve your organization and establish an enjoyable career for myself.

**Sterling**

**Team:** APAC and UK Operations

**Role:** Specialist - Verifications

**Responsibilities:**

* Job applicant’s verification done as per the client’s request for both Qualification (education) and ex-organizations.
* Contacted the organizations across globe as per the requirement.
* Major verifications were done for the APAC regions by the team.
* Allocated the tasks (instances) to the UK and APAC teams.
* Created data bifurcation report for seniors (Managers, Senior Managers) so as to track the missed instances for the previous days, WFMI, number of days open instances, etc.
* Helped create an automated allocation process so as to minimize the manual deduction from the raw data received.
* Monitored the new joiners and helped them understand the process well.

**Achievements:**

* Rookie Award for Quarter 4 of 2018 (for the month of November)

**Experience:** 25 June 2018 till February 10, 2020

**Visible Alpha Solution**

**Team:** One Access - Operations

**Role:** Research Associate (Senior Associate)

**Responsibilities:**

* Update Analyst Coverage on weekly basis on One Access portal.
* Maintaining Universe Overlap in respect of coverage for all the brokers.
* Enhancement initiative for One Access portal and Visible Alpha.
* Communicate with the New York office and take calls for enhancements and discuss about the improvement in process. Taken care of SOPs for almost 5 teams and learned the process.
* Companies updating on One Access portal; Symbolgy project taken care of. One of the critical tasks in Visible Alpha. Objective was to bring Visible Alpha companies and One Access companies of same platform so as to simplify for Tickers on Consensus.

**Experience:** 16 November 2017 till 13 March 2018

**CRISIL, A Standard & Poor’s Company**

**Team:** Structured Finance - CDO

**Role:** Senior Associate

**Responsibilities:**

* Update the principal balances, notes information and transactions made by the trustees for deals.
* We are responsible for updating the accurate data and that the balances should tally with all the sections in the PDF that is given by trustee.
* Trustees that we consider under US sector, are US Bank, JP Morgan, CITI Bank, LaSalle Bank, Deutsche Bank, Wells Fargo and few more
* Consolidate the data for each deal into an excel sheet in a particular manner and format.
* We must make sure that the principal balance is accurate for all the tranches and its respective coupon, coupon type, spread etc.
* We must follow the business rule for each column for each sheet that we fill in for each deal.
* We also should raise queries to trustee if the data doesn’t seem to be accurate or if it does not tally with balances or if the balances in the PDF are missing.
* Under each deal, we update the data for Loans, Structured Finance, Bond and Equity.

**Experience:** 25 April 2016 till June 2017

**CAPITA India Private Limited**

**Team:** Life Customer Service (LCS) – Maturities

**Role:** Senior Executive

**Responsibilities:**

* Issue maturity payment to UK customers as the plan matures.
* Dealing with urgent cases as per the CRU requirement on daily basis.
* Issue payment by Cheque, BACS and Telephonic Transfer or by Special Cheque as per the client’s demand.
* Analyzing cases in respect of assignment with bank or corporate contributor.
* Accumulating data of assignments in sheet and sending disclaimers to assignees six months prior to maturity date.
* Understand the urgency of cases and deal accordingly for meeting paid on time.

**Achievements:**

* Trainee of the Quarter Award – Quarter 3 of 2014

**Experience:** 4th August 2014 to 22 April 2016

**CRISIL, A Standard & Poor’s Company**

**Team:** Management Information System (MIS)

**Roles:** Associate

**Responsibilities:**

* Calculating productivity and utilization for GAC Analytical department.
* Managing and updating reports for Quality framework.
* Creating PPT for Quality framework
* Creating RAMP delegation Matrix files for US domain.
* Solving queries regarding QUEST (Quality Efficiency Synchronizing Tool).
* Reconsolidating yearly sheets in respect of the activities done by GAC Analytical department.
* Dealing all the requests from Managers and Analysts in respect of QUEST.
* Creating SOPs for all the reports managed by all the team

**Experience:** 29 August 2012 to 17 July 2014

Professional Training & Certification

* Attended training program of Advanced **EXCEL** from **APTECH LIMITED**
* Computer Desktop Management skills form **APTECH Limited**

Educational Qualification

**PGDBFM**

NarseeMonjee Institute of Management Studies - *NMIMS* (currently pursuing)

**B. Com**

K J Somaiya College of Arts and commerce (March 2012) scored 75%

**H.S.C. in Commerce**

K J Somaiya College of Arts and commerce (Feb 2009) scored 64%

**S.S.C. in General**

K C Gandhi English High School (March 2007) scored 66%

**Certified Finance Management**

Welingkar Institute of Management scored 65%

**Academic Honors’ & Achievements**

* Passed and participated in Karate competition
* Participated in carom completion in CRISIL
* Have won prizes in Garba competition since 2003
* Participant and winner of Kalagurijari show since 2008
* Performed on ETV Gujrati awards function

Personal Profile

* **Date of Birth :** 29thOctober 1991
* **Nationality :** Indian
* **Languages Known :** English, Hindi, Marathi, Kacchi
* **Address** : 401, Kiran’s Shree Smaran, Besides JVM Shubham, Opp Saket Nagari,

Kasarvadavli, Ghodbunder Road, Thane (West) 400615

**I hereby declare that the above information is true to the best of my knowledge.**

**Place: Mumbai**

**Karishma Vikram Patel**