

## Contact

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## Top Skills

Microsoft Office  
Management  
Microsoft Excel

## Languages

English (Full Professional)  
Hindi (Native or Bilingual)

## Certifications

Comparative analysis of Mergers and Acquisition Data of Thompson Financials, Bloomberg vs Capital IQ  
Loan Market and its different transaction datapoints  
Managing Change Workshop

# Shivali Jain

Senior Analyst - Transactions Research Group at S&P Capital IQ  
Gurgaon

## Summary

A competent professional offering nearly 14+ years of rich experience in Financial Research and Strategy Consulting in the areas of M&A, Private Equity, and Capital Markets. Expertise in business research and analysis, interpretation of statutes & legal documents, usage of 3rd party data sources such as SEC, Nexis, Factiva, NewsEdge.

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## Experience

S&P Capital IQ  
19 years 4 months

Senior Analyst - Transactions Research Group  
October 2008 - Present (11 years 11 months)

Acquired significant exposure in conducting M&A transactions related Financial Research. Successfully analyzed various financial market transactions in the domains of Merger & Acquisitions, Private Equity, Buyback and Bankruptcy, and gained expert understanding of structures, procedures, and regulatory disclosures of M&A transactions globally. Have in-depth knowledge of Securities and Exchange Commission regulations for M&A transactions conducted in the US, and similar knowledge of other markets as well outside the US

Team Management-

- Performing specific analysis on data collected, participating in brainstorming sessions, effectively contributing to team discussions on problem solving, and providing solutions to various critical and specific issues.
- Checking the team quality and productivity, generating ideas to improve it, analyzing error trends, and preparing quality and productivity reports.

Process and Workflow Management-

- Responsible for streamlining and enhancing the guideline modules for the team to ensure better collection and recording of data available.

- Responsible for training the M&A Transaction team on various transactions concepts and ensuring proper guideline understanding and its implementation across teams.
- A lead tester for M&A transactions. Also responsible for documentation of testing methods to ensure smooth testing.

#### Product Development-

- Responsible for developing the transactions prototype based on in-house research, technology and client development teams' feedback.
- Actively lead the testing of the new and enhanced M&A transactions designs for back-end and platform. This included testing for technical or design bugs that could create errors in recording and display of data.
- Post launch testings done after each launch, irrespective of any design or change directly being made to the transaction datasets. This was to ensure that no new bugs affect any transaction dataset.

#### Analyst

October 2004 - October 2008 (4 years 1 month)

##### Gurgaon

Acquired exposure in conducting M&A transactions related Financial Research. Successfully tracked and analyzed various financial market transactions in the domains of M&A and PE; gained insight in transaction dynamics in areas such as acquisition rationale, valuations, deal structuring, and strategic implementation. Well versed with financial tools such as Reuters, Bloomberg and S&P Platform.

- Set up a new process and framed guidelines for incorporating Advisory data in transactions.
- Handled client queries
- Led and managed a team; set their daily work targets and deliverables.
- Organized knowledge sessions and training & induction programs for the team.

#### Senior Research Associate

June 2003 - September 2004 (1 year 4 months)

Handling a team of researchers who collected data on various private and public companies by doing secondary research.

Checking the authenticity of the information collected before entering the database.

#### Research Associate

May 2001 - May 2003 (2 years 1 month)

Was responsible for collecting information on private companies and entering into the company's database.

Calcom Vision Ltd

Engineer

May 1996 - November 1998 (2 years 7 months)

Wazirapur

Incharge of the production line.

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## Education

Indira Gandhi National Open University

Bachelors in Computer Applications, Computer Programming, Specific Applications · (2000 - 2003)

NIIT LTD

Advance Computer Application, Computer Programming, Specific Applications · (1998 - 2000)

Kasturba Polytechnic for Women

Diploma in Electronics, Medical Electronics · (1993 - 1996)

Carmel Convent

Senior Secondary School · (1983 - 1993)