

Asif Iqbal Sr. Specialist - Investments & Reporting Automation

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PROFILE

Multi-disciplinary professional with strong analytical skills and hands-on experience using **Python, VBA, and Power Query** to enhance reporting workflows and data processes. I focus on simplifying complex tasks, integrating data sources, and building reliable, repeatable systems that support decision-making. Known for ownership, structured thinking, and delivering solutions that improve operational efficiency. Open to roles in **data, technology, and finance** where automation, analytical rigor, and process improvement create measurable business value.

HIGHLIGHTS

- **Hands-on experience with Python, VBA, and Power Query** to improve reporting workflows and automate repetitive processes.
- Designed and implemented **scalable reporting systems** that reduced manual effort and improved delivery timelines.
- Known as a **reliable problem solver**, able to translate business requirements into structured, usable outputs.
- **Strong understanding of financial data and investment metrics**, enabling accurate analysis and reporting.
- Proven ability to work under pressure, take ownership of deliverables, and maintain focus on quality and accuracy.
- Collaborative team member, comfortable working across departments and supporting colleagues with complex technical tasks.

EDUCATION

MBA in Finance Delhi University

07/2023 – 06/2025 | Delhi
Specialisation in Finance and AI

Chartered Accountancy(Ongoing) The Institute of Chartered Accountants of India Present

BSC - Bachelor of Science in Physics Veer Kunwar Singh University 2016

High School in Science KV AGCR

WORK EXPERIENCE

Mercer Consulting Pvt Ltd

Senior Specialist

09/2025 – Present | Gurgaon

- Developed **end-to-end automation workflows** for investment reporting using **Python, VBA, and Power Query**, significantly reducing manual effort and improving turnaround time.
- Took full ownership of the **Economic Assumptions reporting process**, integrating market data, macro indicators, and asset-class assumptions into standardized output packs.
- Built **reliable reporting templates and reusable code modules**, improving consistency and scalability across teams.
- Conducted **data validation and quality checks**, reducing errors and improving confidence in downstream analysis.
- Optimized legacy Excel-based workflows by restructuring formulas, automating repetitive tasks, and implementing **macro-driven logic** to handle large datasets.
- Delivered timely performance and benchmarking outputs for institutional clients, maintaining high standards under tight deadlines.

Specialist - Investments

01/2024 – 09/2025 | Gurgaon

- Produced structured performance reports for institutional clients, consolidating large datasets and investment metrics into clear deliverables.
- Leveraged **Python, VBA, and macro-driven automation** to optimize analytical workflows, improving productivity and reducing reporting time.
- Built and maintained **monthly and quarterly Economic Assumptions reports**, integrating macroeconomic indicators and market trends into consistent output models that improved forecasting accuracy.
- Conducted internal **data audits** and validation across reporting systems, improving accuracy, consistency, and downstream analytics.

InCred Wealth

Assistant manager, portfolio Analyst

05/2023 – 12/2023

- Led portfolio reviews for HNI and UHNI clients, delivering clear performance insights and ensuring alignment with investment objectives and risk tolerance.
- Built structured reporting packs and review models, enabling faster decision cycles and reducing dependency on ad-hoc analysis.
- Provided senior management with actionable recommendations based on market trends, portfolio metrics, and client behaviour, supporting stronger allocation decisions.
- Utilized **Ace MF NXT and analytics tools** to extract fund data, validate exposures, and present accurate investment dashboards.
- Enhanced client servicing by translating technical performance results into practical, outcome-focused guidance, improving satisfaction and retention.
- Maintained high standards under tight timelines, demonstrating ownership, accountability, and consistency across deliverables.

Anand Rathi Wealth

Wealth Manager

04/2021 – 05/2023

- Managed end-to-end servicing and operations for a diverse HNI client base, ensuring accuracy, compliance, and seamless execution across transactions and portfolio changes.
- Oversaw a book exceeding ₹100 Cr, maintaining service standards, timely responses, and consistent communication with clients and internal teams.
- Built analytical reports, capital gain statements, and monthly investment packs, improving transparency and helping clients understand portfolio performance.
- Conducted portfolio reviews using structured evaluation methods, highlighting performance drivers, concentration risks, and allocation opportunities.
- Delivered investment presentations tailored to client objectives, supporting informed deployment decisions and long-term planning.



DOMAIN & CORE COMPETENCIES

- Portfolio analytics
- Investment reporting
- Economic assumptions & market indicators
- Capital market fundamentals
- Mutual fund evaluation
- Risk/return assessment
- Benchmarking
- Ownership
- High-pressure execution
- Stakeholder communication
- Structured problem solving
- Continuous improvement
- Reliability



CERTIFICATIONS

Data Science with Python (Internshala) |
Financial Modeling Foundations |
AI Foundations (IBM P-Tech) |
Corporate Financial Statement Analysis |
Excel: Economic Analysis and Data Analytics |
Financial Modeling and Forecasting Financial Statements | **Google Analytics** (Google) |
NISM VB - Mutual Fund Foundation (NISM) |
AI Foundations |
Fundamentals of Digital Marketing (Google)

- Collaborated with internal teams to resolve operational issues quickly, demonstrating reliability, client ownership, and accountability in high-pressure environments.

Anand Rathi Wealth Limited Intern

01/2019 – 07/2019

- Supported portfolio analysis activities by researching market trends, fund performance, and product suitability for client portfolios.
- Assisted in preparing investment presentations and deployment proposals, ensuring clarity and alignment with client objectives and risk profiles.
- Participated in client meetings and servicing activities, gaining firsthand understanding of advisory processes, documentation requirements, and regulatory standards.
- Collaborated with account managers to understand investment allocation, client onboarding, and portfolio monitoring best practices.

Digital India Leader Content Writer

11/2018 – 12/2018

- Produced clear and impactful digital content based on visual and contextual inputs, ensuring accurate message delivery to the target audience.
- Supported campaign execution by aligning captions and content with brand objectives, contributing to improved audience engagement.
- Demonstrated strong attention to detail, time management, and responsiveness in a fast-paced content workflow.



TECHNICAL & ANALYTICAL SKILLS

Python (pandas, numpy, xlwings/openpyxl)

VBA & Excel Macros

Power Query

Power BI

Advanced Excel

ETL workflows

Reporting automation

Data modeling

Data cleaning & validation

Dashboarding & analytics

Process optimization

Time-series trend analysis

Performance metrics

Forecasting

Reusable automation modules

Standardized reporting frameworks