

# MOHIT GUPTA

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## CAREER OBJECTIVE

Quantitative investment professional with experience across sell-side research, factor investing, and derivative strategies. Focused on building rule-based equity and derivative strategies with disciplined risk management.

## PROFESSIONAL JOURNEY

2025	Upstox (Fund Manager) <i>Quantitative Investment Strategies</i>
2022	AngelOne Limited <i>Senior Research Analyst</i>
2022	Edelweiss Wealth Management <i>Lead Analyst- Auto sector</i>
2021	Nirmal Bang (Insti. Equities) <i>Lead Analyst- Auto sector</i>
2020	CLSA <i>Front End- Auto Sector</i>
2019	SBICAP Securities <i>Front End- Auto Sector</i>
2018	Barclays Investment Bank <i>(Region-Europe)- Auto Sector</i>
2016	CRISIL (GR&A)
Finals within gap of 20 days	C.F.A (U.S.A) <i>First attempt</i>
2016	Chartered Accountant (C.A) <i>First attempt</i>
2015	Company Secretary (C.S) <i>A.I.R-21 in Foundation</i>

## AREA OF STRENGTH

- Quantitative Research-** Statistical modelling & factor analysis
- Portfolio Construction-** Risk aware diversified strategies
- Option Strategies-** Systematic calendar spread strategies
- Fundamental Research-** Sector agnostic, bottom-up analysis
- Python-** Quantitative libraries and back-testing & forward-testing

## PERSONAL DETAILS

Currently based in: Mumbai

Email: [mohit\\_gupta03@yahoo.com](mailto:mohit_gupta03@yahoo.com)

D.O.B: 03.05.1993

## WORK EXPERIENCE

Upstox (*Factor Investing + F&O*)

Oct'25-PRESENT

Industry: Financial Services

Job Title: Quantitative Investment Strategies

### Job Responsibilities: *Fund Manager (Equity & F&O)*

- Responsible for developing, designing, back-testing and implementation of rule-based investment models with the objective of generating alpha.
- Creating systematic equity investment strategies using factor-based approaches including value, size, growth, fundamental and thematic factors.
- Creating index derivative trading strategies based on rule-based frameworks.
- Leverage expertise in fundamental analysis to enhance strategy design and support cross-functional collaboration within the investment team.

AngelOne (*Factor Investing + Prop Trader*)

Sep'22- Feb'25

- Lead and managed a team of five members specializing in factor investing, covering key factors such as value, size, growth, fundamental, and thematic.
- Managed and launched 12 factor-investing portfolios on the small case & native platform, focused on generating alpha for investors.
- Responsible for utilizing index option strategies to meet investment performance targets.

EDELWEISS WEALTH MANAGEMENT (INDIAN AUTOS)

Feb'22- Aug'22

- Worked as a lead analyst covering the Indian automotive space.
- Actively conducted road-shows and channel checks with specific focus on mid/small cap stocks.

NIRMAL BANG (INDIAN AUTOS)

Mar'21- Feb'22

- Worked as a lead analyst covering the Indian automotive space.
- Roll out initiation reports, organize sector expert calls and active on-ground checks to enhance sector understanding and regularly service clients.

CLSA (EVS PAYROLLS-INDIAN AUTOS)

Apr'20- Feb'21

- Worked as a front end sell-side associate covering the Indian auto space and was instrumental in ramping up coverage within six months of joining (9 companies).
- Ownership of maintaining models, forecasting and organising calls/events with industry players to gauge trends and formulate actionable ideas.
- Assisting the lead analyst in preparing research reports and addressing client queries.

SBICAP SECURITIES (INDIAN AUTOS)

Apr'19- Mar'20

- Worked as a front end sell-side associate covering the Indian auto space with specific focus on OEMs.
- Extensive participation in dealer calls/events with key industry participants to further enhance sector understanding and cultivate relevant contacts.
- Assisting the lead analyst in preparing research reports and addressing client queries.

BARCLAYS INVESTMENT BANK (GLOBAL AUTOS)

Feb'18-Mar'19

- Worked as a sell-side associate supporting three Europe based analysts, tracking European Automotive Industry with specific focus on OEMs.
- Build financial models, carry out valuations using DCFs, SOTPs & relative valuations, analyse financial statements and monitor sector news flow.
- Maintaining databases and creating presentations using advanced excel functions.

CRISIL (GR&A)

Oct'16- Jan'18

- Worked as a part of the strategic valuation team (buy-side) covering Media sector and providing offshore support to a leading investment bank engaged in asset management services. It involved valuing companies based on a proprietary model.
- Exhaustive analysis of financial statements of sector specific companies and work with their financial models which involved going through various documents.

## ACHIEVEMENTS

- Was voted by a large mutual fund in my first year as Lead Analyst with Nirmal Bang for my strong research services.
- Cleared CA and CFA exam simultaneously within a gap of 20 days in first attempt.
- A.I.R 21 in CS Foundation Examination in June 2012.

## TECHNICAL SKILLS

- Working knowledge of Bloomberg, Capitaline & NAV software, Coding (Python)
- Working knowledge of MS Office: Word, Excel and PowerPoint