

## SURESH PATEL H

**Phone :** +91 9035662525

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A highly analytical individual with a passion for number crunching and analysis with special interest in **Financial Analysis, Modeling and Valuation** preferably in Financial services industry with a reputed organisation

Location Preference: Bengaluru

### PROFILE SUMMARY

- A target oriented professional with 2 years of experience in the field of Equity , Derivatives, Options and Mutual fund
- Gained knowledge in Financial Market, Derivatives and Financial Instruments on MS Excel
- In-depth knowledge of Equity ,Bonds ,Fixed Income Securities
- In-depth knowledge in **Financial Statements and Analysis of a company**
- **Excel Based Financial Modeling method**
- **Gained knowledge in different valuation methods like DCF,EVM etc**

### CORE COMPETENCIES

**Financial Modeling**  
**Financial Analysis**

**Equity Market**

**Valuations**

### ORGANISATIONAL EXPERIENCE

**Aug'17-April'19 Kotak Securities, Bengaluru as Associate Analyst.**

- On boarded 200+ clients in a span of 1.5 years with a total investment of INR 30 million
- Advising and managing HNI's portfolios by giving stock recommendations
- Preparing research report for HNI clients.
- Handling multiple clients' queries efficiently at the same time
- Cross selling of different products such as MF, LAS, ELSS and ESOP
- Financial Analysis of few selected companies.

### Key Skills:

- Strong Analytical background with knowledge of valuations
- Decent writing skills with a flair in financial reporting
- Ability to work under pressure and result oriented
- Good organizational, analytical, problem-solving skills
- Excellent professional communication interpersonal skills
- Target oriented along with organizational goal
- Quick learner with dedication to thrive.

## ACADEMIC DETAILS

2014: Bachelor's degree in business management from New Horizon College (Bangalore University)

2011: Pre – University Education in PCMB from Cathedral Composite PU College , Bengaluru

2009: Secondary Education from Bishop Cotton Boys School ,Bengaluru

## CERTIFICATIONS

2019: FRM Level 1 (Ongoing)

2019: Certified with NISM (Series V A)

2017: Certified with NISM (Series VIII).

## IT SKILLS

- Advanced MS Excel (with formulas like Vlookup, ForeCast, Index-match & Pivots Charts etc)
- Basic Sql (select statements with different type of joins).

## PERSONAL DETAILS

**Date of Birth:** 25<sup>th</sup> October 1992

**Languages Known:** English , Hindi and Kannada

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