

# Mayur Sontakke, CFA, FRM

Finance and investment research professional with over 11 years of progressive experience

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## RESUME SUMMARY

Finance professional with over 11 years' progressive work experience including 4+ years managing high-performing diverse teams of investment research analysts (Fixed income, Equity, Global Macro) and 3+ years as a credit rating analyst at India's largest credit rating agency. Certified Financial Risk Manager, CFA Charter holder, adept at financial statement analysis, valuation, financial modeling, industry research, and relationship management.

## PROFESSIONAL EXPERIENCE

### Advisor – Finance and strategy

*Outpost Asia, March 2018-January 2019*

Advised a Singaporean company in hospitality industry on their business and financial strategy. My role involved helping my client in getting a better sense of the business through data analytics, performing financial analysis and modelling, researching growth opportunities, performing competitor analysis, forecasting and valuation, pitch development etc.

### Manager, Investment Research

*Market Realist Inc., April 2014-August 2018*

As a manager of the investment research team, I managed remote teams of financial analysts who wrote investment research pieces on American public equities, fixed income (IG, HY, LL, Tresuries), and global economies. The equity analysts covered companies in different industries including industrials, airlines, aerospace, defense, automobiles etc. My responsibilities included hiring and coaching new analysts, aiding analysts in research and analysis, reviewing analysts' work, devising content strategy, and setting up OKRs for team members.

- Built a ten-plus member diverse team from scratch and **led growth in the output by 7X in just 24 months.**
- **Built an effective performance and workflow management system for the team members to achieve more.**
- **Initiated coverage on emerging markets**, which gathered attention of global asset managers.

## SKILLS

- Financial Analysis
- Credit research
- Equity Research
- Fixed Income Research
- Economic Analysis
- Valuation
- Business Strategy
- Market Research
- Team Building and leadership
- Financial modelling
- Report Writing
- Relationship Management

## CAREER HIGHLIGHTS

- Built and led a 10-plus member high-performing team for a startup
- As an analyst, my work was cited in various publications
- Predicted a wave of bankruptcies in the American coal industry an year before it started
- My research has got over 2 million pageviews so far
- Handled end-to-end credit rating process for 50+ large corporate clients

## PROFESSIONAL QUALIFICATIONS and EDUCATION

**CFA Charterholder, CFA INSTITUTE**

**Certified Financial Risk Manager, GARP**

**CRISIL Certified Analyst (Postgraduate in Finance), NITIE, Mumbai (2012)**

**Bachelor in Computer Applications, Shivaji University, Kolhapur (2007)**

## Senior Analyst – Coal, renewables, and power

*Market Realist Inc., April 2014-January 2016*

*(I handled dual responsibility of manager of the macro team and senior analyst covering coal and power sectors during April 2014-January 2016)*

- Successfully [predicted a series of bankruptcies](#) in American coal sector a year before they started.
- Successfully [predicted financial trouble for SunEdison](#) when most analysts were bullish and the stock was scaling new highs.
- My investment research pieces have gathered over 2 million page views so far from around the world.
- My research has been cited in various publications including [NRDC](#), [IEEFA](#).

## Associate Vice President

*Amba Research India Pvt. Ltd., August 2013– April 2014*

During my short stint at Amba Research, I helped an American Commercial bank outsource its credit research function. I was a part of the team which made the transition happen. The role involved doing detailed credit analysis on corporate and HNI clients using primary and secondary sources, doing analysis on collateral and covenants, assigning & maintaining internal credit rating on the clients' customers, understanding and improvising processes, and preparing SOPs. I mentored junior team members during my stint.

## Credit Rating Analyst

*CRISIL Limited, July 2010 – August 2013*

At CRISIL, I was a part of Large Corporate Ratings Group where I handled credit rating process for large Indian companies from various sectors. The responsibilities included interacting with C-level executives and top management of client companies and other stakeholders on a continuous basis, analyzing the public and non-public information for credit analysis, financial modelling, arriving at a credit rating recommendation, and presenting the analysis and recommendation in the form of credit rating report to the rating committee, publishing the final rating in the public domain, and keeping continuous surveillance on the rating. I rated the companies in my portfolio based on thorough analysis of business risk, financial risk, management risk, and project risk. I also contributed towards thought leadership pieces on macroeconomic and industry trends published by CRISIL.

- Effectively handled end-to-end credit rating process and ongoing ***relationship with over 50 large corporate clients***.
- Dealt with C-level executives of clients with confidence, early in my career in finance
- Received appreciation on my analytical skills from seniors and rating committee members on numerous occasions.

## E-learning Manager

*AMS Mindworkzz, December 2008 – May 2010*

Helped an e-learning startup with content creation and management. I also taught data interpretation and logical reasoning to MBA aspirants.

## Systems Manager

*Trikon Electronics India Private Limited, October 2007-December 2008*

I Handled system administration activities in an open source platform along with performing research on virtualization, versioning, network monitoring, and source code management.