

# MAHESH SHIRSAT

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## PROFESSIONAL SUMMARY

4+ years of experience in Financial Markets as a Investment Analyst and Financial Research Associate. CFA Level 2 candidate. Certified Financial Research Associate and Equities and Mutual Funds Advisor, Highly skilled in qualitative and quantitative research methods. Excellent organization skills with meticulous attention to detail. Expertise in investment data collection of public and private securities.

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## EXPERIENCE

**Research Associate**, 06/2022 - Current

**Morningstar India Private Limited** - Mumbai

- As a Research Associate (in Venture Capital segment) in PitchBook, Morningstar, I make extensive and thorough research report on companies who are in their venture capital funding stage
- My job is to cover and track all the investment news, corporate actions such as but not limited to merger and acquisitions, leverage buyouts, and primarily track companies who are seeking funding from Angel Investors, Grantors, Corporations, Equity Crowdfunding Platforms and Venture Capital Firms
- Collected large volumes of data with high accuracy.
- Coordinated research projects to achieve overall team efficiency.
- In PitchBook, Morningstar I have given a responsibility to track all the company data from scratch, Such as tracking and updating company's current management, operational and non operational locations, funding history, profitability status, employee counts, line of businesses and thorough analysis and reporting of balance sheet and income statement numbers.

**Equity Advisor**, 03/2019 - 06/2022

**Sharekhan Limited** - Mumbai

- In a role of a Equity Advisor, I used you guide my clients on their financial decisions, such as guiding clients on intraday trades, short to long term investments decisions, and planning and managing their portfolios as per their financial goals
- Apart from this I was given an opportunity by my firm to handle a mutual fund business
- In that role I was given a responsibility to grow firm's client base and generate more awareness of mutual funds among existing clients.



## CONTACT

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## CORE QUALIFICATIONS

- Research paper publication
  - Methodological research
  - Data entry
  - Mutual funds understanding
  - Advising on investments
  - Financial market analysis
  - Stock market expertise
  - Microsoft Office
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## LANGUAGES

- English
- Hindi
- Marathi
- Gujarati

- Assessed company's financials to provide immediate and long-term recommendations.
  - Researched suitable investment opportunities for clients to increase gains and minimise losses.
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**EDUCATION**

Bachelor's, Financial Markets, 2020

**Mumbai University**

GPA: 7.5

Securities Market, Finance, 2019

**National Institute of Securities Market**

I have cleared following NISM Exams (National institute of securities markets) -

- 1) Equity and Derivate's Valuations
  - 2) Mutual Funds Operations
  - 3) Securities Operations and Risk Management
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**LANGUAGES**

**Hindi:** First Language

**English:** C2  
Proficient

**Hindi:** C2  
Proficient

**Gujarati:** B2  
Upper Intermediate

**Marathi:** C2  
Proficient