

Summary

Experienced and well rounded financial services leader with work history in wealth management and technology. Led, consulted and implemented measurable impactful business practices in global organizations including launching financial advisory desk in private banking at ICICI Bank in India with assets under management of \$ 1B. Sound professional skills in market research, financial services, portfolio and investment management, people management and consulting.

Professional Experience

- Renaissance Venture Capital Fund (RVCF)**, Research Contractor, Ann Arbor, MI, US Summer 2017
- Analyzed and evaluated database of 400 unique portfolio companies for Renaissance Venture Capital Fund.
 - Developed a framework for categorizing companies based on sectors, domain specializations and others attributes identified companies technologies/services/capabilities, existing customers and strategized potential new customers.
- Persistent Systems**, Lead Business Analyst (Consultant: Capital Markets), Pune India 2013-2014
- Consulted financial services senior management, program managers and project managers on client deliverables and helped retain a significant client in Canada.
 - Successfully implemented the first knowledge-building initiative for the financial services department focused on capital markets and developed use cases for a prototype portfolio management system.
- Symbiosis Institute of Business Management/ SCMLD**, Visiting Professor, Pune India 2013-2013
- Taught advanced financial courses on wealth management, investment analysis, derivatives and portfolio management and counseled students on career advice.
 - Designed and developed complete coursework for investment analysis and portfolio management through presentations and case studies which included overviews on macroeconomics, fundamental valuation in equities, Markowitz portfolio theory, efficient frontier and trading strategies in derivatives.
- Standard Chartered Bank**, Product Development and Assurance Intern, Shanghai & Singapore 2010-2010
- Assessed and tabulated term sheets and designed the framework for structured products for Consumer Bank Market Sales (CBMS) and Private Banking.
 - Researched and evaluated different global mutual funds for clients in Shanghai and devised a strategy for the brokerage business in Taiwan.
- ICICI Bank**, Head Indian Investment Financial Advisory Desk, Private Banking, Mumbai India 2005-2009
(Domestic and International Product Team)
- Set up investment financial advisory desk in private banking with assets under management of \$1B at ICICI Bank (largest private bank in India with assets \$109B) to advise clients with an investible surplus of \$1M in portfolio management, financial planning and investments.
 - Collaborated with the legal, compliance, and research teams regarding due diligence of financial advisory in domestic private banking. Promoted a group of 30 private bankers in India through the implementation of a framework for investment strategies and knowledge dissemination through presentations.
 - Mentored and managed a team on investments, financial planning, and portfolio advisory.
 - Assisted in setting up the financial advisory desk as part of international product team in international private banking in 2007-2008. Tracked global macroeconomic trends, developed from scratch a framework on investment strategies for global asset managers including hedge funds, global mutual funds, fund of funds, and international structured products (exotic and range accrual plans linked to equity, interest, commodity, etc.).
 - Interacted with investment committees, research teams, and treasury to formalize our investment outlook across asset classes and asset managers with active calls on investment products and global structured products.
- ICICI Bank**, Private Banker / Wealth Manager, ICICI Bank, Mumbai, India 2005-2007
- Increased book value of our portfolio by \$50M and managed a portfolio of \$100M (including stock options). Increased client penetration by 50% through an increase in product portfolio and new client acquisitions among top investment bankers, asset managers, and C-level executives.
 - Consistent top performer, rated among the top 20% in 2005-2006. Generated direct revenue of \$80,000 over two years and cross-sold other asset products generating indirect income for the bank.
 - Won the Fixed Deposit Challenge in India in 2006 (New Client Acquisition of Fixed Deposit \$10M).
 - Hand-selected for the pan-India International Private Banking division from the domestic private banking pool.
- HDFC Bank**, Personal Banker, Pune India 2004-2005
- Assisted in branch operations and client services. Increased Branch sales of investment products and ranked among the top 3 in credit card sales through banks.

- L'Oreal India Pvt**, Business Developer, L'Oreal India Pvt, Calcutta India 2002-2003
- Developed business in North Calcutta, Mizoram and expanded into the challenging markets of Jharkhand and Orissa with 120% revenue achievement and increased distribution in salons by 200%.

Leadership, Awards, and Community Service

- **Leadership:** Led and set up the financial advisory desk in private banking at ICICI Bank in India. Mentored, managed and coached a team on investments and portfolio management and promoted investment strategies among private bankers.
- **Merit:** Ranked among the top 1% in the competitive examination for the Master's program at the Symbiosis Institute of Business Management (SIBM) in India. Placed 3rd in the Reliance Infocomm Quiz conducted at national level. Certified in Securities and Futures Products from Institute of Banking, Singapore.
- **Community Service:** Volunteered as a teacher for three years at a visually-impaired school in Pune, India (2013-2016) and taught courses in communication skills and personality development with significant social impact. Promoted nonprofit Maher Ashram. Raised \$10,350 as a student caller through gifts from alums at the University of Michigan, Telefund.
- **Spiritual Sabbatical:** Took a one-year leave (2014-2015) to spiritual places, monasteries, and Vipassana centers in Asia. Build my equanimity through meditation and mindfulness, traveled to spiritual places in Asia including monasteries and served in Vipassana centers.

Skills & Additional Information

- **Tech, Finance & Data Analysis:** WordPress, Statistics, MS Office, Program Evaluation, Valuation, and Stata (beginner).
- **Blogger/ Social Entrepreneur:** Entrepreneurship spirited launched my blog @Themiddleroad.org which has global readership of 20,000 articles until September 2017.
- **Extra Curricular:** Represented CEIBS in HKUST International Soccer; Participated in prestigious Kellogg Education Innovation Case Competition; Sanger Leadership Crisis Challenge and Michigan Business Challenge. GRE 321: Quant 88 percentile.

Education

- Master of Public Administration**, University of Michigan, Ann Arbor 2016-2017
- **Policy Foci:** International and Economic Development, Program Evaluation, Social Impact, and Financial Markets.
 - **Coursework:** Quantitative Methods for Program Evaluation, Valuation, Economic Decision Making, Growth and Stabilization in the Macro Economy, Politics in Public Policy, Nonprofit Management (Passed waiver examinations in Statistics and Calculus).
- Master of Business Administration**, China Europe Int'l Business School, Shanghai China 2009-2011
Exchange Business School: Nanyang Business School, Singapore
- **Global Ranking:** CEIBS ranked 11th in the Financial Times comprehensive business school rankings; exchange partner with U-M Ross, Wharton, Chicago Booth, Tuck, among others.
 - **Coursework:** Fixed Income Securities, Value-Based Innovation, Macroeconomics, Advance Corporate Finance, Emerging Markets Finance, Industry and Competitive Analysis, Marketing.
- Master of Business Administration**, Symbiosis Institute of Business Management, Pune, India 2000-2002
- Bachelor of Electronics Engineering**, VIT, University of Pune 1994-1999