



Prathamesh Raghuvir Adhikari

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+91-7507693133 📞

Nashik, India 📍

I am an aspiring Equity Research Analyst always in search of learning new things and developing my skills to add value to the company

EDUCATION

CFA Institute

Passed Level 2 of the CFA Program

06/2018 - Pres08ent

NISM

NISM V - A Mutual fund Distributors Certification exam

2020

B. Tech, Production Engineering

Vishwakarma Institute of Technology, Pune

07/2013 - 05/2017

9.39 CPI

Major Project

- ISRO sponsored project on Friction Stir Welding

Higher Secondary School Certificate

H.P.T. Arts and R.Y.K Science College, Nashik

07/2011 - 05/2013

87%

Secondary School Certificate

Vidya Prabodhini Prashala, Nashik

06/2001 - 05/2011

90.73%

WORK EXPERIENCE

Chief Investment Officer

SWS Financial Solutions Pvt Ltd

01/2020 - Pres08ent

Nashik, Maharashtra

It is a family owned business unit started by my dad where we provide all financial services under one roof

Responsibilities

- Research Head for Mutual Fund Portfolios
- Fund Manager of a Large & Mid Cap Portfolio

Project Internship

HDFC Asset Management Company Ltd

09/2019 - 12/2019

Mumbai, Maharashtra

Projects Completed

- Historical analysis for various mutual fund scheme and comparing them with Benchmark Indices
- Analysis of Global Index performance with Indian Index
- Basics of Financial Modelling on two listed companies

AREAS OF INTEREST

Equity Valuation

Economics

Portfolio Management

Customer Relationship Management

EXTRA CURRICULAR ACTIVITY AND ACHIEVEMENTS

- Started Financial Literacy Club and was a part of core committee of Speakers Club in engineering college

- Acted as Production and Industrial Students Association Head in engineering college

- Participated in various intra-college competitions such as UV Act, Street play and Drama

- Achieved Rank 1 in Production department of engineering college on an aggregate basis of 4 years

LANGUAGES

English, Hindi and Marathi

Full Professional Proficiency

WORK EXPERIENCE

○ Customer Relationship Manager

SWS Financial Solutions Pvt Ltd

08/2017 - 08/2019

Nashik, Maharashtra

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Responsibilities

- Involved in client interaction and Financial Planning
- Developing mutual fund scheme selection process
- Building portfolio of mutual funds