

ROMIL ZAVERI

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EDUCATION

Narsee Monjee College of Commerce and Economics , Mumbai, India	2018-2021
Bachelors in Financial Markets	CGPA: 9.58/10
CFA Institute , Cleared CFA level 1	2021

ACADEMIC PROJECTS

Commodities Market

- Prepared a report on the usage of OTC and exchange-traded derivatives for the purpose of hedging commodities by manufacturers, and traders in order to safeguard price levels.

Corporate Finance

- Led a team of 4 in conducting an evaluation and financial analysis of L&T Finance Holdings.

Marketing in Financial Service

- Led a team of 6 to plan and develop an auto insurance business based on a complex and dynamic driver score to calculate the premium amount.

WORK EXPERIENCE

Financial Analyst , Adroit Financial Services, Mumbai, India	Dec'21 - Jan'23
<ul style="list-style-type: none">Developed weekly equity market reports after extensive research and analysis of various sectors' performance in the economy thereby fostering better investment decisions and improving returns by 15% over mean level.Composed portfolio factsheets for 10 clients with a combined portfolio of over INR 50 million every week after reviewing individual portfolio performances resulting in an improvement in client retention.Suggested alternative investment and asset allocation strategies which led to an increase in the overall portfolio profitability by over 10%.	
Equity Research Intern , HDFC Securities, Mumbai, India	Nov'19 - Feb'20
<ul style="list-style-type: none">Researched and analysed information on the Indian Auto Industry and generated reports for the institutional /retail clients and recommended stocks that provided a holding period return of over 20%.Assisted in estimating target price using various financial models such as DCF and CCA and predicted the position of equity to be taken.Attended a 3-day Analyst Meet organised by HDFC securities which involved interactions with CFOs and CEOs of various companies from different sectors.	

EXTRA AND CO-CURRICULAR ACTIVITIES

Portfolio Management	Jun'21 - Present
<ul style="list-style-type: none">Managing portfolios of 6 clients with an asset under management of around 200,000 USD.Investing in various asset classes including equity, derivatives and alternative investments including Cryptocurrency, non-fungible tokens (NFTs), Watches etc. and generating consistent returns.	
Co-Founder, E-Commerce Store (Visennia)	Mar'20 - Aug'20
<ul style="list-style-type: none">Set up the entire store online from scratch using Shopify as our store's web platform.Dealt with overseas distributors to source products for the store.Handled the financial aspects of the business which included budgeting and accounting.Effectively utilised social media platforms for building customer relationships and client engagement, increasing the client base by over 30%.	

Achievements

- Cleared CPT from Institute of Chartered Accountants of India with full marks in LAW.
- Delivered a lecture on "Cryptocurrencies" as a guest speaker at Ahmedabad University.
- Nascent Symbiote honour for outstanding Performance in environment education.
- Ranked first in a business planning competition with the idea of an online gambling website that would reward users' "points" for the amount of money they lose which they could in turn redeem for various product from partner merchants, was offered INR 1 million to develop it.

SKILLS

Languages: English (proficient), French (intermediate), Hindi (native), Gujarati (native), Marathi (intermediate).

IT Skills: Adobe suite, Microsoft Office program, FL studio.

Certifications: NISM VIII Derivatives certification from the Securities and Exchange Board of India, Business Communication and Technical Analysis from Narsee Monjee College, Financial modelling and Valuation from Leapup Academy.