



Prathamesh Raghuvir Adhikari

prathamesh806@gmail.com ✉

+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

Chartered Financial Analyst (CFA)

Feb 2022.

NISM

NISM XXI-A PMS Distributors Certification

2023

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 - Present,

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

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

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

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