

Parvaiz Mansoori, CFA

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Work Authorization: US Citizen

Work Experience

A-One Jewels

Hong Kong SAR, Mumbai | June 2019 – June 2024

Financial Analyst

- Conducted in-depth financial modeling and cash flow analysis to support investment decisions across equities, mutual funds, ETFs, and real estate assets.
- Prepared client-ready investment proposals and presentations, incorporating market trends, risk assessment, and asset allocation strategies.
- Researched and evaluated potential investment opportunities, including credit quality, capital structure, and long-term return potential.
- Drafted and maintained term-sheet style summaries for proposed investments and monitored deal execution timelines.
- Liaised with tax authorities and legal representatives to resolve disputes and ensure compliance with regulatory requirements.
- Built and updated internal databases tracking portfolio performance, market developments, and investment pipeline.

The Starter Labs

Mumbai, India | Jan 2019 – Apr 2019

Digital Marketing Specialist

- Developed and presented pitch materials for diverse clients, coordinating campaign deliverables to meet strategic timelines.
- Conducted data-driven analysis of campaign performance, implementing A/B testing to optimize outcomes.
- Managed and maintained client contact databases to support targeted outreach and engagement.

Education

CFA Institute

| 2019 – 2022

Chartered Financial Analyst – CFA® Charterholder

Member of CFA Society New York (1540 Broadway)

Passed all 3 levels of the exam on the first attempt

University of Mumbai – UPG College of Management

Mumbai, India | 2015 – 2018

Bachelor of Management Studies – Specialization in Finance

Relevant Coursework: Business Economics, Financial Accounting, Corporate Finance, Strategic Financial Management, Taxation, Business Law, International Finance, Investment Analysis and Portfolio Management

Certifications

- Data Science Professional Certificate – IBM. Learnt the basics of the ETL data Pipeline. SQL, IBM Watson
- Data Analytics Professional Certificate – Google. Learnt the foundations of storytelling with data
- Investment Foundations Certificate – CFA Institute.
- Financial Markets Course – Yale University.