Yash Diwate

(319)-936-7730 | yash-diwate@uiowa.edu | www.linkedin.com/in/yash-diwate |
www.biz.uiowa.edu/henry/analysts/yash-diwate
US Work Authorization available (Optional Practical Training)

EDUCATION

The University of Iowa | Iowa City, IA
Master of Science (STEM designated), Finance, GPA 3.64/4.0   **08/2022 - 05/2024**

University of Mumbai | Mumbai, India
Master of Commerce - Accounting & Finance, First Class Degree   **07/2019 - 06/2021**
Bachelor of Management Studies, Finance, GPA 6.2/7.0   **07/2013 - 06/2016**

EXPERIENCE

The University of Iowa | Iowa City, IA
Equity Analyst- Financial Services sector | Henry Fund   **12/2022 - Present**
- Selected competitively to manage $20 million endowment equity portfolio with five other master's students
- Performed industry and company research along with valuation in financial services sector, totaling 12% of portfolio
- Presented Buy/Sell recommendations to the Investment Advisory Board and re-balanced portfolio every 6 months

Graduate Teaching Assistant | Department of Economics   **08/2023 – Present**
- Led 3 sections of Principles of Macroeconomics, graded assignments and held office hours

Sushil Financial Services Pvt Ltd | Mumbai, India
Equity Research Analyst | Investment Research   **07/2019 – 07/2022**
- Spearheaded bottom-up research on 20 companies in Automobile OEMs & Ancillaries, Engineering & Capital Goods, and Power & Utilities sectors to initiate coverage on two reports per quarter, resulting in returns up to 40%
- Served on the Investment Committee for firm's proprietary portfolio managed by the Chairman-MD, providing over 15 stock investment recommendations annually, directly contributing to firm's profits
- Marketed recommendations to fund managers, high net worth individuals, and retail clients based on new coverage and earnings reports. Frequently acknowledged with research quality awards by four Institutional Investors
- Advised in-house portfolio managers daily for large client portfolios

Equity Research Associate | Investment Research   **05/2018 – 06/2019**
- Coordinated with lead analysts to develop and maintain 14 accurate financial models for 20+ quarterly updates
- Engaged with 30+ investor relations teams and attended analyst conferences to inform investment recommendations
- Designed custom screeners using Capitaline database software to identify and analyze companies based on specific financial parameters. Shortlisted over 150 stocks for firm's equity universe to outperform benchmark indices

Research Associate | Wealth Management   **06/2017 – 04/2018**
- Published insights on 50+ IPOs to clients, leveraging knowledge gained from management interactions at roadshows

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LEADERSHIP, ACTIVITIES & VOLUNTEERING

- **Leadership**: Vice President-Quantitative Finance Club; Member-Specialized Masters Student Association
- **Activities**: CME Group University Trading Challenge 2022 (top 15% globally), Bloomberg Global Trading Challenge 2022, Venture Capital Investing Competition 2023, CME Group University Trading Challenge 2023
- **Volunteering**: Corridor Kiwanis Club of Iowa City

CERTIFICATIONS & SKILLS

Chartered Financial Analyst (CFA): Level 2 candidate   **11/2023**
CFI Financial Modeling and Valuation Analyst (FMVA): Credential ID: 79217825   **08/2023**
CFI Capital Markets and Securities Analyst (CMSA): Credential ID: 79207922   **08/2023**
DataCamp Data Scientist Professional certificate: Credential ID: DS0027734332030   **07/2023**
Bloomberg Market Concepts certificate: Credential ID: nUWq5nE2DVaQyzVP7WECffj6   **09/2022**
Chartered Wealth Manager (CWM): Level 2 passed   **05/2017**
Tools: Excel, PowerPoint, Word, Python, R, SQL, LaTeX, GitHub FactSet, Pitchbook, Bloomberg terminal, WRDS
Data Skills: Financial Modeling, Machine Learning, Data Visualization, Statistical Analysis, Data Manipulation