

Yash Diwate

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EDUCATION

The University of Iowa, Iowa City, IA

Master of Science (STEM), Finance 08/2022 - 12/2023

- **Coursework:** Fixed Income, Statistics, Derivatives, Equity Valuation, Data Programming in Python, Portfolio Management, Corporate Investment and Finance Decisions, Quantitative Finance and Deep Learning
- **Leadership:** Co-founder-Quantitative Finance Club, Member-Specialized Master's Student Association
- **Activities:** CME Group University Trading Challenge 2022 (top 15%), Bloomberg Global Trading Challenge 2022

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 through a competitive process to manage the \$20 million equity portfolio of the University starting in spring

Teaching Assistant | Department of Finance 09/2022 - Present

- Administered student assignments for 120 students in Wealth Management and Corporate Finance classes

Sushil Financial Services Pvt Ltd, Mumbai, India

Equity Research Analyst | Investment Research 07/2019 - 07/2022

- Initiated coverage by writing 2 reports/quarter on 20 companies in Automobile OEMs & Ancillaries, Engineering & Capital Goods and Power & Utilities Sectors based on bottom-up approach and primary research
- Served on the Investment Committee for the firm's proprietary investment portfolio managed by the Chairman-MD, provided more than 15 stock investment recommendations annually, directly contributing to the profits of the firm
- Marketed recommendations based on new coverage and earnings announcements, to Institutions, High Net Worth and Retail clients; part of the team which consistently received awards from 4 Institutional Investors for research quality
- Advised in-house portfolio managers, with daily updates and recommendations, for large client portfolios

Equity Research Associate | Investment Research 05/2018 - 06/2019

- Supported the lead analyst with creating and updating 14 financial models, over 20 quarterly updates, summarizing earnings conference calls, interacting with corporate investor relations teams, and attending analyst conferences
- Identified and analyzed companies by designing custom screeners with Capitaline software based on specific financial parameters and shortlisted over 150 stocks for the equity universe of the firm, a portfolio to beat benchmark indices
- Prepared daily market summary product 'Diary' which provided a snapshot of the relevant news from the day

Research Associate | Wealth Management 06/2017 - 04/2018

- Analyzed and corresponded over 50 IPOs to clients after attending roadshows and interacting with managements
- Maintained database of mutual fund strategies and their asset allocations monthly for relationship managers

Birla Sun Life Insurance Company Ltd, Mumbai, India

Intern | Business Development and Sales 04/2015 - 06/2015

- Generated leads by spreading insurance awareness and sold 4 life insurance products to clients

ICICI Prudential Asset Management Company Ltd, Mumbai, India

Intern | Marketing Research 05/2014 - 06/2014

- Executed an industry-wide market research project with an objective to recommend a social media marketing strategy for the company's mutual fund products across 3 advertising platforms (Facebook, YouTube, Twitter)
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AWARDS, CERTIFICATIONS, SKILLS, AND LANGUAGES

US Work Authorization (Optional Practical Training)

Awarded Graduate Scholarship of \$15,000 from the University of Iowa

Chartered Financial Analyst (CFA): Level 1 passed 06/2018

Chartered Wealth Manager (CWM): Level 2 passed 05/2017

Technical Skills: Excel, Pivot Tables, PowerPoint, Word, Python, Oracle Crystal Ball, FactSet, Bloomberg, Capital IQ

Languages: English- full professional proficiency; Hindi, Marathi, Gujarati- native proficiency