

CHARANPREET SINGH

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EXECUTIVE SUMMARY

Highly detail-oriented and analytical individual with a proven passion for finance and operations. Possesses a strong understanding of financial statements, including balance sheets, income statements, and cash flow statements, enabling insightful analysis and informed decision-making. Proven ability to conduct thorough due diligence investigations, leveraging strong analytical and problem-solving skills to identify key risks and opportunities.

Demonstrated experience in financial modeling, valuation, market research, industry analysis. Comfortable working independently in a fast-paced environment while also thriving as a collaborative team member. Eager to contribute significantly to the success of a dynamic private equity firm by leveraging analytical expertise and a strong work ethic to support investment decisions, portfolio company performance, and overall firm growth.

AREA OF EXPERTISE

- **Equity Research:** A highly detail-oriented approach to equity research with an emphasis on stating practical projections and valuations.
- **Financial Presentation:** A strong approach to presenting financial data suitable to any context such as valuation, research and viability analysis.
- **Microsoft Excel:** Proficient in Conditional Formatting, Pivot Tables, Slicers, Data Visualization, Sorting, Charts, Data Analysis and Financial Modelling.
- **Securities and derivatives:** Comprehensive understanding of financial markets, encompassing equity securities, fixed-income instruments (bonds, treasuries, etc.), and derivative products (options, futures, swaps).
- **Reconciliation & Trade life cycle:** Proficient in trade lifecycle management and reconciliation processes.

ACADEMIC PROFILE

(2024-25)

Imarticus Learning, Delhi

Certified investment Banking Professional

- Securities and derivatives
- Trade Life Cycle
- AML/KYC
- Settlement and Reconciliation
- Asset Management
- Risk Management
- Collateral Management

(2021-2024)

S.G.T.B KHALSA COLLEGE, UNIVERSITY OF DELHI

- **Bachelor's of commerce**

(2010-2021)

A.G.D.A.V CENTENARY PUBLIC SCHOOL

- **CLASS 12 (CBSE)**
- **CLASS 10 (CBSE)**

SKILLS (Hard skills and Soft skills)

• SOFT SKILLS

1. Adaptability: Quick to learn and adjust strategies, keeping up with financial trends and tools
2. Teamwork: Experience working effectively in teams to deliver high-quality outcomes.
3. Effective Communication: Capable of clearly articulating financial information to both technical and non-technical stakeholders.
4. Critical Thinking: Strong ability to analyze situations, break down complex problems and find efficient solutions.

• HARD SKILLS

1. MS Word: Possess proficiency in function knowledge and demonstrate seamless workflow capabilities.
2. MS Excel: Functions such as VLOOKUP, HLOOKUP, DATA ARRAY, conditional formatting, SUMIF, COUNTIF, and COUNTIFS.
3. AML/ KYC

LANGUAGES KNOWN

- English : R/W/S
- Hindi : R/W/S
- Punjabi : R/W/S

ACHIEVEMENTS

- Successfully captained the college cricket team
- Sports captain for DUSU year 2022-23

CERTIFICATIONS

- Investment banking operations (Imarticus learning)
- Business communications (Internshala)
- Reconciliation Life cycle in trades (shiksha)

PERSONAL INFORMATION

Date of Birth : 09/06/2003
Address : Model Town, Delhi