

SHUBHAM JAIN

Immediate Joining Available | Ex-Marquee Equity, Torch Investment Mgt. | CFA Level 2 | SRCC
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PROFESSIONAL EXPERIENCE

Jan'22 – Dec'22

FREELANCE

- Working with a **Bengaluru-based EV company** assisting them in structuring & raising their **Series A round**. Previously, helped them successfully raise **USD 1.5M in their seed round**.
- Worked with a **Cannabis recruitment firm based out of Canada** assisting them in preparing collaterals for their fundraise.

Jan'20-Dec'21

MARQUEE EQUITY

Senior Investment Analyst

- Worked with **80+ early-stage startups & investment funds** across a wide range of sectors & geographies with direct client interaction and management.
- Serviced more than **INR 8 million in revenue** for the Company. Responsibilities include understanding the clients' business and assisting them in raising funds by building their Financial Model, Pitch Deck, and Investment Memos from scratch.
- **Select Transactions**
 - Indian Ed-tech Companies
 - Europe-based Luxury Office Space Manager
 - Switzerland-based Carbon Emissions Trading Platform
 - US-based Crypto Mining & Hardware Company

Sept'18 – Jan'20

TORCH INVESTMENT MANAGEMENT

Investment Analyst

- Worked on **15+ Private Equity, Capital Market and Advisory mandates** across a wide range of sectors including Real Estate, Fintech/Alternative Lending, Consumer Staples and Apparels serving various UHNW clients as a Multi-Family Office (MFO)
- Prepared pitches for Investment Committee based on company & market research
- Prepared valuation models based on DCF, NAV and IRR analysis using market data & research.
- **Select Transactions**
 - Worked on an Asset based Co-Investment Fund focused on Real Estate (Development, REOs, NPLs, Distressed Assets)
 - Assisted in fund raising for a **€30 Mn co-investment fund** focused on Real Estate acquisitions (Development, Distressed and REOs)
 - Evaluated **5 Real Estate transactions**, assessed financial, economic and legal viability by primary and secondary due-diligence processes
 - Prepared Teasers, Pitchbooks & Investment Memos with transaction outline, sector detailing & financial analysis of deals under assessment
 - Assisted in preparing a **Strategic Asset Allocation Project for a \$100-120Mn mandate**
 - Assisted in planning, execution and construction of a global portfolio matching investor objectives and constraints
 - Researched and analyzed potential equity, fixed income and alternative investment securities using proprietary research platforms like **Bloomberg Terminal**
 - Selected investments based on quantitative and qualitative analysis of ETFs and Active funds across various asset classes
 - Analysed **10+ Investment Advisory mandates** and evaluated various businesses including a Late-Stage VC Fund, a leading Indian Fintech startup & a Ground-handling company by analysing financial models, in-person interactions with management and preparing evaluation reports

INTERNSHIP EXPERIENCE

- June'18 – Sept'18 **TORCH INVESTMENT MANAGEMENT**
Private Equity Intern
- Assisted the investment team in analysis of **5+ PE transactions** across various sectors such as Real Estate, Fintech, SME lending and Forex trading
 - Accepted the **pre-placement offer (PPO)** based on the performance during the 3-month tenure as Private Equity Intern
- Dec'16 – Jan'17 **MOTHERSON SUMI INFOTECH & DESIGNS LTD.**
Project Trainee
- Monitored and analysed various procedural and taxation processes of the 'Account Receivables' unit of the Book-keeping department

ACADEMICS

- 2022 **CFA Institute, USA** **CFA Level 2**
Passed CFA Level 2
- 2019 **CFA Institute, USA** **CFA Level 1**
Passed CFA Level 1
- 2015-2018 **Shri Ram College of Commerce** **B.Com (Hons.)**
- Secured a CGPA of **7.88 out of 10**
 - Member of the Organizing Committee of 'Youth Conclave'- a leadership conference
- 2015-2016 **Institute of Chartered Accountants of India** **CA-CPT, CA-IPCC**
- Cleared **CA-CPT** (entrance examination) with **66% score**
 - Cleared **CA-IPCC** (Group 1) with **62% score**
- 2014-2015 **Central Board of Secondary Education** **Class XII (HSC)**
- Among **top 0.1% candidates (All India)** with **97.8% score**
 - **100/100 in Accountancy**, conferred with **Chairman's Award, Salwan Group of Schools**
- 2012-2013 **Central Board of Secondary Education** **Class X (SSC)**
- Secured a CGPA of **9.6 out of 10**
- CO-CURRICULAR ACTIVITIES**
- Secured 1st position in English Elocution in school
 - Member of the Cricket Team in secondary school.