



YASHASHREE SHETTI

📍 Dubai, UAE

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Professional Summary

Driven investment banking professional successful gathering, modeling and utilizing key data for diverse projects. Technologically savvy and keen to learn new programs quickly. Top-notch administrator, leader and project manager.

Skills

- Investment Banking
- Interpersonal Communication
- Client Relationship Development
- Team building
- Financial and operational reporting
- Attention to Detail
- Powerpoint Presentations
- Expertise in Excel
- Analytical Thinking
- Mergers & Acquisitions
- Industry Research & Analysis
- Credit Rating
- ESG projects
- Research & due diligence
- Portfolio Management
- Recruitment skills

Work History

04.2024 - Current

Insurance and Investment Associate

Seven Insurance Brokers LLC - Dubai, UAE

- Life Insurance: Maintaining client records, preparing quote as well as client life insurance portfolio based on insurance provider products suiting clients' needs. Bridging the gap between the insurance provider and the client for premium payments, new business requirements, partial/full withdrawal, switching of funds and re-directing the investment strategy, reinstatement of policy, change of premium and for many other requirements
- Medical and General Insurance: Preparing individual quotes based on client data and suiting the client requirements, requesting medical application form and necessary medical data from the client to proceed further with the client application. Worked on group quotation tools for generating quotes based on the group census, thus bridging the gap and helping the client (group) to secure the best insurance coverage for the employees
- Investment Portfolio: Maintaining client stock related portfolio – recording the gain or loss and the cash position of the stock. Worked on dealing forms for buying/selling instruction for the stock and also keeping track of the records on the market price while the stock was been bought & sold

11.2021 - 01.2024

Senior Associate - Investment Banking, Research

Barclays Inc. - Gurgaon, India

- Handled Consumer Retail Group: Preparing company public & private profiles, segment and product profiles, M&A case studies and newsletters
- Industry Research: Preparing extensive industry research on various industries including home care, quick service restaurant, consumer retail, fashion & personal care and many more
- Worked on broker reports, transcripts, company's annual/quarterly reports, credit rating pages, as well as ESG projects. Implemented process improvements that led to significant time savings and increased accuracy in deliverables.
- Trained and supported new team members, maintaining culture of collaboration

11.2017 - 11.2021

Senior Associate - Investment Banking, Research

Sutherland Global Services - Mumbai, India

- Handled Aerospace/Defense and Military Industry: Conducting company research, preparing company profiles, and industry research. Preparing annotation charts, broker recommendation reports, analytical recommendation charts, financial overview of the company, peer comparison charts, competitive landscapes and many more.
- Trading and Transaction Comps Screening: Screening transaction comps and trading comps
- Streamlined operational efficiency by identifying areas for improvement and proposing actionable solutions.
- Consistently maintained strong relationships with clients, ensuring clear communication and timely updates on project progress.

07.2014 - 11.2015

Senior MIS Executive - MIS Operations & Analytical

CRISIL Limited - Mumbai, India

- MIS Preparation: Preparing weekly and monthly MIS, coordinating with managers and IT support
- Employee records dashboards for performance and consistency.
- Supervised audit processes to address non-compliance.
- Determined data retention parameters based on organizational requirements.
- Implemented advanced analytics tools, enabling more accurate predictions of market trends and customer behavior patterns.
- Streamlined report generation for improved decision-making with efficient data extraction and analysis techniques.
- Trained new employees on using MIS tools effectively, ensuring seamless integration into the team's workflows.

07.2011 - 07.2014

Senior Assistant, Insurance & Investments

Smart Solutions - Mumbai, India

- Insurance and Investments: Preparing financial plans, managing cash and bank controls, reconciliation, interacting with agents and clients.
- Provided exceptional support to executive leadership by managing schedules, coordinating travel arrangements, and preparing materials for meetings and presentations.

- Assisted in budgetary planning and financial forecasting for the department, ensuring accurate allocation of resources and monitoring expenses closely.
- Conducted thorough market research to inform strategic planning decisions regarding product offerings or service enhancements within the organization.
- Used data processing and statistical software to process large amounts of data and paperwork.

01.2011 - 06.2011

Associate

Willis Towers Watson - Mumbai, India

- Accounts and Settlements: Responsibilities for UK and Australia process, calculations, communication with clients.
- Fostered a positive work environment by promoting open communication channels between staff members at all levels.
- Cultivated strong working relationships with key stakeholders in order to facilitate collaboration towards shared goals.
- Improved customer satisfaction by effectively addressing queries and resolving issues in a timely manner.
- Oversaw daily operations by coordinating schedules, monitoring workflow progress, and resolving any obstacles or bottlenecks encountered along the way.

01.2008 - 11.2010

Associate, Ratings

CRISIL Limited (S&P Global) - Mumbai, India

- Credit risk ratings and analysis on ratings: Analyzing credit risk, updating financial spreadsheets, incorporating adjustments, assisting the Project Manager, developing relationships with S&P analysts.
- Self-motivated, with a strong sense of personal responsibility.
- Worked effectively in fast-paced environments.
- Skilled at working independently and collaboratively in a team environment.
- Managed time efficiently in order to complete all tasks within deadlines.
- Organized and detail-oriented with a strong work ethic.
- Paid attention to detail while completing assignments.

08.2006 - 12.2007

Technical Assistant

Eurasia Shipping Company - Mumbai, India

- Supporting shipping staff, planning ship requirements.
- Gathered, organized and distributed technical documentation.
- Prepared technical presentations and other materials for advisory meetings.
- Collaborated with cross-functional teams to develop innovative solutions for complex technical challenges, driving business growth.
- Facilitated effective communication between technical and non-technical staff members by translating complex concepts into easily understandable terms.

Education

01.2022

MBA (Finance), Welingkar Institute
Status: Cleared

01.2016	●	Associate Financial Planner (AFP), Financial Planning Standards Board of India (FPSB) Status: Cleared
01.2011	●	Master of Commerce, University of Mumbai Grade: Second Class (55.50%)
01.2006	●	Bachelor of Commerce, Mulund College of Commerce Grade: First Class (68.89%)
01.2004	●	HSC, Mulund College of Commerce Grade: First Class (63.50%)
01.2001	●	SSC, Vidya Prasarak Mandal School Grade: First Class (74.06%)

Accomplishments

- Well versed with **Bloomberg, S&P Capital IQ, FactSet, Factiva, Merger Market, Pitchbook, Preqin and LCD Comps databases**
- Acuity Knowledge Partners: **Promoted** to Senior Associate in February 2023
- Sutherland Global Services: Recognized for trust and support - Sep 2018; Recognized for work performance with spot award- Nov 2018; Recognized as Rock Star 2018 - Jan 2019; Recognized as Rock Star FY 2020 and FY 2021
- CRISIL: Quarterly Performance Award - Apr 2009, Numero Uno Award - Oct 2014; Recognition for outstanding service quality from Standard and Poors'- Nov 2008

Languages

English	Hindi
Marathi	Kannada

Availability status

1 month

Personal Information

Visa Status: Family Visa