



FINANCIAL MODELING

EXPERT PROFILE



VISHWANATHAN MB

Viswanathan is a Chartered Accountant and also holds the Chartered Financial Analyst (CFA) designation having over 11 years of experience in a wide variety of roles and functions including financial modelling and valuation, project finance, equity research, consulting, corporate finance, talent management and training.

Having worked at organizations of differing sizes including large organizations such as Citigroup and Ford as well as small organizations such as The Smart Cube, he brings unique and varied organizational perspectives. He has personally built over 100 financial models and oversaw a huge project that has built over 200 financial models. He has also served as AVP- Training at Citigroup Global Markets.

He is the owner of Money Shastra, an online portal focused on educating investors and enabling them to take appropriate financial decisions; and Partner at Proventia Consulting, a firm that provides consulting to start-ups and SMEs. As proprietor of MoneyShastra, he has built a quantitative model using stochastic approach to optimize asset allocation for individual investor, which received an overwhelming response at Palisade Risk Conference, 2016.

He is also associated with TAPMI Business School visiting faculty. He is also a highly sought after corporate trainer who has conducted training for 50+ corporates including Tres Vista, Cognizant, LIC Nomura, Tata Sky, Mahindra Comviva, Shapoorji Pallonji, and Smart Cube.

He also holds the FRM designation and is a Commerce graduate from Loyola College, Chennai.

WORK EXPERIENCE

Citi Research

AVP - Training - Aug 2012 - Aug 2015

- *Worked closely with management to identify training needs (TNI)*
- *Delivered training on various topics for research professionals from the levels of associate till managing directors*
- *Automated several internal MIS reports*

The Smart Cube

Manager - Aug 2008 - Aug 2012

- *Advised strategy head of a leading insurance firm on market environment, product positioning and go-to-market strategy*
- *Advised a leading healthcare player on an M&A*
- *Led several projects for leading global financial players*



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Think Equity India

Senior Associate - Jul 2006 – Jul 2008

- Served as a senior research associate covering HCM solutions
- Mentored and trained other associates (those from B.Tech background) in accounting, modeling and valuation

Ford India

Financial Analyst - Mar 2005 – Mar 2006

- Automated month end reconciliation process bringing down the cycle time from one week to two hours
- Resolved long pending issues with various dealers across the country; personally appreciated by president of the company

QUALIFICATIONS

CFA Charterholder

- Passed CFA Level 3 in 2010 and has been member of the Indian Association of Investment Professionals since 2011

Earned FRM designation in 2008

- Passed FRM (financial risk manager certification by global association of risk professionals) in 2007

Qualified as Chartered Accountant in 2005

- Holds FCA designation since 2015

Graduated in commerce from Loyola College, Chennai in 2003