RAUL BHARDWAJ

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**SUMMARY**

Finance professional having diverse work experience in financial modelling, financial reporting, investment recommendation, valuation & direct taxation looking for a career enhancement. Proven track record in mergers & acquisitions segment delivering actionable insights, optimising financing structures, maintaining client relationships and supporting senior decision making in value driven investments.

**EDUCATION**

**MSc Finance and Investment – University of Bristol *Sep 22 – Sep 23***

**Key Modules**: Asset Pricing, Quantitative Finance; Financial Reporting; Corporate Finance & Banking; Financial Modelling; Investment Management; Empirical Finance;

**Dissertation**: *Impact of Quantitative Easing & Volatility Spillover on UK Commodities (Natural Resources)*

**ACA Final Level III – The Institute of Chartered Accountants *May 20 – Present*Key Modules**: Financial Reporting; Strategic Finance; Cost Management; Direct/ Indirect Tax Law; Corporate Banking & Law

**WORK EXPERIENCE**

**Research Analyst - Investment Mitra Dec 23 *- Present* | *London***

* Conducted thorough financial analysis to evaluate investment decisions using financial modelling models such as DCF, LBO.
* Conducted in-depth research on company backgrounds identifying key strategic drivers and forming strong investment theses.
* Supervised a team of 3 in preparing project financing documentation to secure a term loan from nationalised bank for setting up edible oil manufacturing plant resulting in sanction of loan.
* Analysed financial statements (Income, Cash Flow, Balance Sheet) & transactions to identify trends and recommended leveraging balance sheet strength to pursue debt financing growth opportunities which were presented to the CFO.
* Consistently exceeded expectations for the quality of financial models, providing analytical insights that supported strategic decision- making at senior management level.

**Research Executive - Investment Mitra Aug *21 - Nov 23***

* Assessed financial data & transactions to gauge investment opportunities, evaluating and managing investment risk using DCF, leveraged buyout, comparable valuation model to identify sound investment options.
* Monitored industry trends and economic indicators analysis of comparable companies through common sizing.
* Conducted ratio analysis, Duo Pont analysis, equity/dividend valuation, bond analysis, portfolio management fundamentals to assess financial performance & transactions.
* Performed valuations, lead due diligence processes, assessed deal benefits, provided investment advice based on research.

**Consultant – HKM & Co, Chartered Accountants *July 19 - July 21***

* Handled 400+ Australian tax matters including Australian individuals & corporate ITR and GST matters.
* Computed tax liabilities, prepared Business Activities Statement & Installment Activity Statement.
* Undertook Australian Tax Office (ATO) communications work resulting in an 85% success rate in tax disputes.
* Drafted 20+ comprehensive opinions & tax planning for tax/accounting matters resulting average tax saving of 10% for clients.

**Finance &Tax Assistant – PKM Garg & Co, Chartered Accountants ` Aug *13 - June 19***

* Preparation and presentations of financial statements as per IFRS (regulatory requirements) including listed companies.
* Handled search/survey transactions (legal), regular & scrutiny, and income-escaping assessment.
* Managed a compliance-based assignment, drafting an appeal to CIT, High Court appeal documentation, with a penalty proceeding leading to savings of $2 million in penalties.
* Drafted opinion on direct tax and international tax transactions, applied double taxation avoidance agreements, prepared foreign remittance authorisation documents, and joint development agreement/policies.

**SKILLS & ACHIEVEMENTS**

* **Award:** £2000 Grant from The Jim & Peggy Wilkinson Innovation Fund, Bristol University for an ideation stage Start-Up
* **Programming:** Bloomberg, Stata, ERP Tally 9, MS OFFICE, ZERO
* **Certifications:** Jobaaj Learnings: *Investment Banking Certification on Financial Modelling & Valuation.*

Institute of Chartered Accountants: Management*, Presentation and communication skills certification.*

Institute of Chartered Accountants**:** *100 hours of information technology training.*

**EXTRACURRICULAR**

* Network and Social Liaison Officer**:** *Volunteering and Fund-raising Network, University of Bristol*
* Equity Analyst**:** *Bristol Trading Society, University of Bristol*
* English Language Volunteer**:** *University of Bristol, Senate House*
* Personal Interest: *Basketball, Fitness, Astrology, Travelling*