

Salonee Sanghvi, CFA

Top 100 Women in Finance in India 2020 by Association of International Wealth Management of India

salonee@hlinvesttrade.com ✉
saloneesanghvi@gmail.com

+91-9833556110 📞

linkedin.com/in/saloneesanghvi in

WORK EXPERIENCE

Founder – My Wealth Guide

Goal-oriented wealth management

01/2019 – Present

Mumbai, India

- Unbiased 360° holistic financial advisory backed by research. Simplifying money, improving financial literacy

Co-founder – Arque Tech

Start-up financial services venture creating cutting-edge investing products

07/2015 – 12/2018

Mumbai, India

- Leveraging artificial intelligence for long term asset management

Research Team – RARE Enterprises

Proprietary Asset Management firm of Mr. Rakesh Jhunjhunwala

01/2007 – 02/2015

Mumbai, India

- Core member of research team that manages the investment portfolio of Mr. Rakesh Jhunjhunwala
- In-depth financial analysis to identify stocks across industries fit for the firm's portfolio & investment style
- Value creation analysis and forecasting for key portfolio companies including assisting in the strategic road-map
- Economic analysis to identify trends

Investment Manager - Sterling Consultancy

07/2005 – 12/2006

Mumbai, India

- Financial ratios analysis of company performance
- Tracking mutual fund activity and performance

Junior Information Analyst – McKinsey & Co

05/2004 – 05/2005

Gurgaon, India

- Working in tandem with consultants from European offices to provide financial research, comprehensive company analysis, industry benchmarking, event analysis and general research including competitive analysis
- Workflow management for the team based on skill set and availability

SKILLS & COMPETENCES

Research

Fundamental Analysis

Investments

ORGANISATIONS

Member - CFA Society India

2008 – Present

- Programing and Networking Committee (2010-12)

Director Membership - Rotary Club of Bombay Queens Necklace Heirloom

2020 - Present

Vice President - Rotaract Club of Bombay Airport

2009 - 2011

Youth Wing of Rotary International

Foodalong

2013 – Present

One of India's top **research based food & travel photo blogs** with a focus on local vegetarian food and offbeat travel

- Nominated on BlogAdda, Indian Food Bloggers Awards, Holidify, Thrillophilia, Tours In India

Founder – It's Showtime

2012 – Present

Mumbai's sole theatre community with over 600 members to foster an interest in theatre and live acts

- Featured in leading dailies and weeklies like Mid-Day, HT, HT Brunch, Vogue, Mumbai Mirror

EDUCATION

Chartered Financial Analyst

CFA Institute

2007

USA

Masters of Commerce - Banking & Finance

Sydenham College of Commerce & Economics

2004 – 2006

Mumbai, India

Bachelors of Management Studies - Finance

Sydenham College of Commerce & Economics

2000 – 2004

Mumbai, India

CERTIFICATES

- Investment Lab with the Masters - FLAME University
- AMFI - Mutual Fund Distributors
- Alliance Francais Level 2