

Aisha Patel

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SUMMARY

Detail-oriented Investment Analyst with over 5 years of experience in financial modeling, investment research, and risk assessment. Proven track record of delivering actionable insights that drive investment strategies and enhance portfolio performance.

EXPERIENCE

Investment Analyst

Jan 2022 - Present

Global Finance Group, New York, NY

- Conducted in-depth analysis of equity and fixed income securities, resulting in a 15% increase in portfolio returns over 2 years.
- Developed financial models that improved forecast accuracy by 25%, optimizing investment decision-making processes.
- Collaborated with cross-functional teams to evaluate new investment opportunities, successfully identifying assets worth over \$10 million.

Junior Investment Analyst

Jun 2019 - Dec 2021

Innovative Investment Partners, New York, NY

- Supported senior analysts in preparing investment reports and presentations that enhanced client communications and satisfaction by 30%.
- Utilized Bloomberg Terminal and Excel for data analysis, streamlining reporting processes and reducing preparation time by 40%.
- Assisted in monitoring economic trends and their impact on investment portfolios, leading to timely adjustments that saved clients an average of \$500K annually.

Financial Analyst Intern

Jun 2018 - Aug 2018

Bright Futures Investments, Boston, MA

- Participated in the evaluation of investment opportunities, contributing to a project that raised \$1 million in funding.
- Conducted market research and gathered data to support investment strategies, resulting in actionable recommendations for senior management.

EDUCATION

Bachelor of Science in Finance

May 2018

Boston University, Boston, MA • GPA: 3.7

SKILLS

Technical Skills: Financial Modeling, Data Analysis, Risk Assessment, Portfolio Management

Tools & Frameworks: Bloomberg Terminal, Excel, SQL, Tableau