

Aisha Patel

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SUMMARY

Results-driven Portfolio Manager with over 6 years of experience in asset management and investment strategies. Proven track record of optimizing portfolios to enhance returns while managing risks effectively.

EXPERIENCE

Senior Portfolio Manager

Jan 2022 - Present

Tech Investments LLC, San Francisco, CA

- Increased portfolio performance by 20% year-over-year, surpassing benchmark indices through strategic asset allocation.
- Led a team of 5 analysts to develop a risk assessment model that reduced potential losses by 15% during market downturns.
- Implemented advanced analytics tools to optimize investment decisions, resulting in a 30% reduction in analysis time.

Portfolio Analyst

Jun 2018 - Dec 2021

Wealth Management Partners, Los Angeles, CA

- Managed a diversified portfolio valued at \$250M, achieving returns of 18% annually through effective market analysis.
- Developed proprietary investment models that improved predictive accuracy by 25%, aiding in better decision-making.
- Collaborated with clients to tailor investment strategies, resulting in a 40% increase in client satisfaction scores.

Investment Associate

Jul 2016 - May 2018

Global Finance Advisors, New York, NY

- Assisted in managing client portfolios worth \$150M, focusing on equity and fixed-income investments.
- Performed market research that identified opportunities leading to a 10% increase in portfolio yield.
- Streamlined reporting processes, reducing preparation time by 20% and enhancing reporting accuracy.

EDUCATION

Bachelor of Science in Finance

May 2018

University of California, Berkeley, Berkeley, CA • GPA: 3.7

SKILLS

Technical Skills: Portfolio Management, Risk Assessment, Investment Strategy, Financial Modeling

Tools & Frameworks: Bloomberg Terminal, Morningstar Direct, Excel VBA, Tableau