

CA BHARAT RAJATIYA

Chartered Accountant | CFA Level 2 candidate | Investment and Finance

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[CA Bharat Rajatiya](#)

<https://BharatRajatiya.com>



SUMMARY

Experienced finance professional and Chartered Accountant with strong expertise in **investments, financial analysis, treasury, and IFRS reporting**. Proven ability to manage accounting and finance functions independently, deliver strategic insights, ensure regulatory compliance. **Actively seeking finance roles in Dubai/UAE.**

EXPERIENCE

Aditya Birla Capital – ABSLI (Insurance Business)

Finance Manager – Investments Mumbai Oct 2024 – Mar 2026

Finance vertical of Indian Conglomerate Aditya Birla with a Market Cap of \$ 112Bn+

1: Valuations and Cash flow 2: Derivatives and Treasury 3: MIS reporting

- Recognised with **Quarterly top performer award** under category “Idea Machine” for performance excellence and innovations
- Managed **treasury operations and optimized fund utilization**, generating incremental income of ₹50L+ through improved liquidity deployment
- Collaborating, building and maintaining strong relationships** with brokers, custodians, and intermediaries to ensure smooth execution
- Calculated **hedge effectiveness, offset ratios, and valuations** of OTC derivatives (FRA) to support risk management strategies
- Valuations of bonds, money market securities and other class of securities**, providing accurate and timely insights to senior management and regulators
- Prepared and presented **investment and treasury MIS reports** to senior management

UBS Investment Bank

Finance Analyst - Leveraged Finance Pune Feb 2023 – Aug 2024

Swiss based investment bank having a strong presence in USA and EMEA

- Contributed in corporate Lending team, focusing on **Special Situation Group, Leveraged Capital Markets, and Risk Management**
- Single headedly performed **analytical reviews, variance analysis and GAAP analysis** of financial statements related to investment banking products
- Automated multiple reports** and control resulting in saving of daily 3+ Man hours
- MTM validation, trend analysis, and P&L reporting** under IFRS 9 and IFRS 15
- Collaborated with onshore teams, risk and other teams for deal review** and to address critical issues in timely manner

Parikh and Associates, Chartered Accountant

Article Assistant Ahmedabad Jun 2021 – Jan 2023

Leading CA Consultancy firm having strong footprints in Ahmedabad

- Executed **Statutory Audits in Manufacturing, Real Estate, Finance and HealthCare Industry** with turnovers from ₹50 crores to ₹400 crores, involving detailed analysis of financial statements
- Proficient in preparing and filing **GST return and related works, income tax planning** and return filings
- Financial Planning and Accounting (FP&A)**, preparation and finalization of financial statements from the scratch for regulatory and financing
- Handled **Concurrent Audit of Foreign bank** reviewing the corporate loans, trade finance and other corporate and personal banking functions
- Performed multiple projects including **Technical Economic viability report, Project Financing, Real estate compliance, Advisory Assignment, Pre Audits and Tax Compliance**

LANGUAGES

English, Hindi, Gujarati

EDUCATION

Chartered Accountant

The Institute of Chartered Accountants of India

Jul 2019 – Jul 2024 – All level in First attempt

- Final : 380/600 (63%)
- Intermediate : 444/800 (55%)
- Foundation : 273/400 (68%)

CFA Level 1

CFA Institute, USA

May 2025

Score

1760 / 1900

Bachelor of Commerce - A&F

Gujarat University, Ahmedabad

Jul 2019 – Jul 2022

GPA

7.31 / 10

CORE COMPETENCIES AND COURSES

CORE COMPETENCIES

- Treasury & Liquidity Management
- Fund Optimization & Cash Forecasting
- Investments & Portfolio Valuation
- Risk Management & Scenario Analysis
- Financial Accounting and Audit

CERTIFICATIONS

- NISM VIII - Equity Derivatives - SEBI
- NISM XV - Research Analyst - SEBI
- Financial modelling – CFA Institute
- Technical Analysis and Future trading
- UAE VAT and Corporate tax

SKILLS AND INTERESTS

SKILLS

- Strong knowledge of **financial markets, trading** and derivatives.
- IFRS, VAT and Corporate Tax**
- Proficient in **MS Excel, Word, PowerPoint (MS Office), SAP, Tally, python and Power BI**
- Proven **communication, presentation**, and interpersonal skills.
- Quick learner** and adaptive
- Financial modelling**, Planning and Budgeting

INTERESTS

- Solo traveling and networking

EXTRA CURRICULARS

- Presented research paper on “**Algo Trading**” in CA Conference with **800+ audience**
- Invited as **Guest speaker** in multiple sessions and guiding fellow aspirants through **15,000+ LinkedIn** network
- Created interactive **personal site** showcasing work portfolio
- Volunteered** in Robinhood Army NGO