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Chirag Jain, CFA

Mumbai, India

PROFESSIONAL EXPERIENCE

ASK Asset & Wealth Management	Investment Analyst	Mar'25 – till date

- Execute private equity investments for family office clients across **fintech, data centres, defence, D2C fashion and new-age FMCG**, owning the **end-to-end deal lifecycle**: sourcing, structuring, valuation, due diligence, documentation, Investment Committee materials and **closing 6 deals**
- Drive investment decisions across **six family-office portfolios by conducting deep manager and market research, evaluating 100+ funds and strategies annually**, and constructing portfolios optimized for **client-specific return, risk, liquidity, and tax objectives across public and private markets**

Key AI-led Projects:

- Built and run a data-driven **Investment Committee framework for a ~₹200 crore multi-asset fund**, creating an auditable process for asset allocation and tactical shifts that **delivered ~10% outperformance vs Nifty 50 TRI over 12M (net of fees),** strengthening governance and decision tracking
- **Conceptualized and built a proprietary client deepening platform using advanced analytics, automation, and LLM-assisted workflows** to identify cross-selling opportunities, optimize product penetration, and **improve wallet share, product penetration, and deepen client relationship**
- Automated portfolio reviews and performance measurement (XIRR, benchmarks) in **Excel VBA**, **cutting recurring prep time by ~90%** (10 to 1 hrs per cycle)

Key Mandates:

- Originated and executed **private equity deals in defence sector**, raising **~₹100 crore via structured equity**
- Lead a **~$22M goal-based global multi-asset portfolio** for a promoter-led offshore family office, delivering customised allocation; **~13% annualised return**
- Led investment structuring for a global family office on a **₹300 crore promoter monetization**, designing a long-term multi-asset strategy; **~70% deployed**

JPMorganChase	Investment Analyst	Apr'24 – Mar'25

- Tracked **global macro, geopolitical and capital market trends** to inform strategic and tactical asset allocation across multi-asset portfolios; **6 views adopted by CIO**
- Evaluated **funds, ETFs and alternative strategies** through quantitative screening, factor analysis and qualitative due diligence**; 150+ screened, 12 recommended**
- Conducted **manager research** across asset classes, meeting **40+ fund managers and applying J.P. Morgan's quantitative and qualitative frameworks**
- Partnered with the CIO team on **five risk-profiled multi-asset model portfolios**, delivering recommendations, performance attribution and risk analytics
- Authored client communications and **RFP responses for OCIO mandates**, articulating investment views and portfolio frameworks; **12 RFPs, 5 wins (~$200M)**

Key Mandates & Projects:

- Hospital finance committee **($30M)**, research foundation & association **($60M)**, university investment endowment **($75M)** and civilian R&D foundation **($50M)**
- Built a dashboard using **Alteryx & Tableau for investment advisors to compare 1000+ funds under JPMorgan's universe** on various parameters and metrics

JPMorganChase	Investment Banking Analyst (DCM)	Jun'22 – Mar'24

- **Executed 10+ sector-agnostic DCM transactions** (high yield, leveraged finance and investment grade), ~$200bn aggregate, including **acquisition financings** across Term Loan B, HY bonds, bridge, RCF and DDTL; **built pro forma credit metrics, capital structure, covenant capacity and liquidity runway analysis**.
- Built pitchbooks and **execution materials (trading/transaction comps, bond and term loan pricing, J.P. Morgan credentials)** and pro forma financing models with sensitivities on **debt sizing, leverage, interest coverage and liquidity, supporting syndication** and execution **across 50+ pitches, 10 mandates won.**
- **Partnered with syndication team**: prepared investor calls, captured investor feedback and reflected key themes in roadshow **across 10 deals, ~100 meetings.**

Key Projects:

- Identified **~$200M fee-upside through profitability and wallet-share analytics**, and automated reporting workflows (Alteryx, Excel) to cut turnaround time by 75%.

Key Deals:

- **Global biopharma:** Executed J.P. Morgan-led $31.0bn, **8-tranche senior unsecured bond financing a large-cap oncology acquisition**; ~3x oversubscribed.
- **Payments/fintech (sponsor-led):** Executed **~$9.4bn cross-currency acquisition financing (~$8.4bn term loans/HY bonds + ~$1.0bn RCF)** for a majority-stake buyout

JPMorganChase	Research Analyst	Nov'19 – Jun'22

- Produced **sector-agnostic market views** across geographies and market-cap segments, combining financial modelling, sector theses and company deep-dives
- Built **sector pitchbooks and marketing memos** for cross-product bake-offs (M&A, ECM, DCM, advisory), **supporting origination and mandates; 30+ pitches, 8 won**
- Developed pitch analysis: **strategic alternatives, valuation (trading comps, precedents), capital structure, funding options** and process timelines
- Authored a **daily "State of the Markets" note (100k+ readers)** consolidating cross-asset developments and daily IB prints (M&A/ECM/DCM) and **tracked J.P. Morgan's league-table standings (volume, market share)** to inform coverage priorities and pitch angles.

Redseer Strategy Consulting	Associate	July'19 – Oct'19

- Built decision-grade deliverables: **executive decks, market-sizing models, dashboards, KPI trees**, translating complex analysis into actionable recommendations.
- Delivered **5+ strategy engagements in 4 months**, structuring problem statements into hypothesis-led workplans via interviews, expert calls and desk research.
- Ran **cross-industry competitive and market benchmarks** (go-to-market models, pricing, KPI frameworks, marketing levers, channel strategy) to surface whitespace opportunities and strategic gaps for **Khatabook, Zomato, B Capital, Magicpin, Mars Food and Perfetti Van Melle**.

Key Mandates:

- Perfetti Van Melle: Evaluated **channel attractiveness**, competition and route-to-market; **built market entry roadmap; 2 priority channels.**
- Zomato: Assessed **Zomato Gold economics and viability** via stakeholder interviews and market scan, analysing market impact; **flagged margin risk.**
- Mars Food: Benchmarked **competitor marketing playbooks across ATL/BTL/TTL**, identifying spend and strategy patterns and levers to improve effectiveness.

EDUCATIONAL QUALIFICATIONS

Degree	Institute	%/CGPA	Year
CFA Charter	CFA Institute	-	2024
BBA (Finance)	Christ Deemed to be University, Bengaluru	8.88 / 10	2019
Class XII	Delhi Public School Ruby Park, Kolkata	75.60	2016
Class X	Delhi Public School Ruby Park, Kolkata	87.40	2014

COMPETITIONS & CERTIFICATIONS

Case Study	▪ **Podium finishes in all 10 management fests entered (1st in 4, 2nd in 6)** in inter- and intra-collegiate case competitions	2016-19
CFA	▪ Cleared **all three levels of the CFA Program on first attempt** and awarded the CFA Charter in 2024	2022-24

POSITIONS OF RESPONSIBILITY

Core Member - CU	▪ Ran **end-to-end operations** for 3 national/international competitions (Vistas, Thrive, Esprit); **150+ teams, ₹1Cr sponsorship** ▪ **Built and led contingents** for intercollegiate fests, winning **30+ overall titles** ▪ Led a team of **200+ students** across event heads, team members and volunteers	2016-19

SKILLS, EXTRA-CURRICULARS & OTHERS

Skills & Tools	▪ Financial Modelling | Valuation | Due Diligence | Excel & VBA | Tableau | Alteryx | Bloomberg | FactSet | Gen AI Specialist
Interests	▪ Cricket | Marathon | Fitness | Cooking | Geopolitics | Hybrid Athlete

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