TAVISH SHARMA, CFA

+91-9717437968 | Mumbai, India | tavish071199@gmail.com | LinkedIn | Substack

Private Wealth • Investment Advisory • Portfolio Strategy • Alpha-Oriented • Multi-Product Specialist • Client Engagement

5+ years in global investment advisory, spent working directly alongside CIOs, founders and decision-makers; owning execution from an idea to outcome. My edge is breadth without sacrificing depth: product research, portfolio management and client communication have been the focus of my entire career. My research is rooted in quantitative rigor and data, layered with fundamental, first-principles judgment. I'm driven by curiosity and a single conviction - to lead an idea from thesis to outcome for the client.

I believe Indian advisory is at the cusp of inflection as product specialists and portfolio managers step up to own client relationships, with aligned incentives to manage portfolios actively, while technology absorbs routine work for PMs and RMs.

Work Experience

• Achievements • Deliverables

Senior Analyst, Portfolio Strategy & Advisory | Cubera Advisors (Private Wealth Advisory) — Mumbai | Sep 2025 – Present

Joined as the sole bridge between the investment desk and clients, advising HNIs, families and corporates on global portfolios: **$60M for 23 clients**; handled a team of 4 (research & trade ops).

- Owned **$15M+ across 3 mandates**, from risk profiling to allocation, execution and reviews.
- Improved the firm's **portfolio review process** using Claude for real-time updates, cutting process time from **10 to 2 days**.
- Built **multi-product model portfolios** by translating macro insights into asset allocation, woven with client profiles; global listed equities, bonds, REITs, commodities across US, EU, China and India and domestic mutual funds.
- Co-authored **newsletters, market outlooks and product memos**; taking ideas from IC discussions to client conversations.
- Partnered with the founder on client acquisition: built **pitch decks and joined conversations** as the investment specialist.

Buy-side Analyst, Global Equities | Clearstone (Multi-family Office) — Delhi | Apr 2023 – Sep 2025

Worked directly with the CIO, managing **$100M for 4 families**; investing globally in equities, REITs and domestic private markets; experience spans streamlining workflows, idea generation, portfolio strategy and reporting.

- Generated **XIRR of 18.4%** across 13 listed equities & 2 REITs, equal-weighted over **~19 months**; drove **$20M** in allocations.
- Halved research time from **4 to 2 days** using AI, enabling wider coverage and faster negative screening.
- Built a **risk-liquidity scoring** framework for **13 portfolios**; enhanced cashflow management and reporting.
- Ran **full-cycle research** from sector and theme selection to security ideas and valuation: **65+** companies across **11+** industries (India, US, EU, SE Asia), with **19+ memos** to the CIO.
- Built **valuation models** and ran quantitative backtests of factors and assumptions, contributing to **macro analysis** for strategy and asset allocation.
- Co-owned monthly **portfolio reviews**; performance attribution, market outlook and investment activity for CIO and families.

Analyst, Private Markets | Kristal AI (Wealth-tech Startup) — Bengaluru | Sep 2021 – Mar 2023

Part of a 5-member product team advising HNIs on private market deals in India and Singapore; experience spans research, pitching ideas, curating collateral, deal execution and client engagement.

- Led end-to-end execution of **7+ Pre-IPO** secondaries, **5+ early stage** primaries; deployed **$25M** into client portfolios.
- Drove digital client engagement, leading to **35% repeat investment** within existing clientele and **19 new client** acquisitions.
- Analysed **71+** tech-companies across India and USA covering SaaS, Fintech, and D2C verticals; wrote **memos** and pitched **ideas** in the investment committee.
- Partnered with RMs as the private-markets **product specialist**: curated collateral, hosted client webinars and ran email campaigns, and joined client conversations.

Education and Certifications

NISM X-A & X-B (Investment Advisory)	NISM, India	Cleared	Oct 2026
CFA (All 3 Levels)	CFA Institute, Virginia	Cleared	Feb 2025
BBA (Finance Specialization)	Christ University, Bengaluru	3.5/4	Jun 2021
CISI (All 3 Levels)	CISI, London	80/100	May 2021

Product Knowledge Listed Equities • Private Markets • Mutual Funds • REITs • Managed Funds • Offshore Investments

Sector Coverage Consumer • Healthcare • Technology • Industrials • Energy • Real Estate • Banking & Financials

Skills Versatility • Critical Thinking • Attention to Detail • Problem-solving • Content Writing • Creativity • Entrepreneurial

Tools Bloomberg (BQL) • AlphaSense • Microsoft Office • FactSet • PitchBook • CB Insights • Google Workspace • Claude