

# Sounak Mitra

Project Manager

📍 New York, NY, USA

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## Languages

Hindi (Native)

Bengali (Native)

French (Basic)

English (Fluent)

## About

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### BRANDS WORKED WITH

Kcs Wealth Advisory: A \$400 Aum Wealth Management Firm

Peterson Capital Management, Llc

Tada Cognitive Solutions/cgn Global

## Experience

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### ● Project Manager

Tada Cognitive Solutions/cgn Global | Aug 2021 - Now

- o Project Manager/Lead for a client project that will provide Key Performance Indicator (KPI) widgets on Tada for a large CAT dealer: I define the final product by analyzing client data, lead communication between client and internal teams, and make sure that the project is on track by using agile methodology
- o Work directly under the VP of Strategic Operations to build business models, conduct market and competitor research, prepare executive presentations for investors, research potential client industries to close new deals, and align deliverables to overall strategy of the company
- o Delivered on a cross-country logistics analysis problem for a large Westcoast-based coffee retailer and provided a solution that would deliver \$3.2M in cost savings
- o Tada Platform: Developing a root-cause analysis and performance improving Finance Module to provide management assistance across various levels of corporate structure
- o Integration of Data Science Technique: Analyzed error-prone big data using R for predictive outcomes and supply chain inventory management

### ● Investment Consultant

Kcs Wealth Advisory: A \$400 Aum Wealth Management Firm | Jul 2021 - Jun 2022

- o Assisted the Director of Investment Research in developing and implementing client portfolios and performed equity and other investment research, 10K analysis, and linear regression modeling of businesses
- o Supported the rebalancing and trading of client portfolios towards allocation targets, heeding realized gains, using the Tamarac platform
- o Helped maintain data quality in the portfolio accounting software (Tamarac), update reporting areas such as security categories and target allocations, analyze and update financial/security models, and build data analysis and automation tools in Excel
- o Assisted the investment team with creating client investment proposals, year-end analysis spreadsheets, and other investment marketing materials with the help of the Ycharts platform
- o Provided research support for the firm's pitch on potential travel surge and related opportunities in the coming decade at Southern California's 10K Club Meeting

### ● Hedge Fund Analyst Intern

Peterson Capital Management, Llc | Apr 2021 - Aug 2021

- o Automated 'Structured Dividend Capture' Trading Strategy practiced at the firm, which includes 13F report analysis of top 100 value-based firms. Automated a significant portion of the process via Python to analyze and manipulate hundreds of Excel files and reduced weeks of manual work to 20 minutes every quarter
- o Learned about financial modeling, quant analysis, options trading, and web-scraping in the process
- o Performed investment valuation of a Real Estate Investment Trust (REIT) stock by analyzing 183 properties spread over 40 states in its portfolio and conducted 10K report analysis
- o Conducted sum-of-the-parts valuation of Naspers and its subsidiaries Prosus and Tencent and researched recent complex share exchange proposition between the prior two companies to recognize an investment opportunity
- o Identified fundraising opportunities by researching potential investors, family offices, endowments, etc. in Texas, esp. Austin
- o Presented at the Annual Meeting of the firm, elucidating on Philosophy's Value to Investing (here, 5:04)
- Working on an ML based Trading App with PlateRate.com Co-founder Garrett Lang (Bound by NDA)
- Volunteer at Missionaries of Charity (Mother Teresa's Org) Soup Kitchen,

Harlem December 2020 – Present o Coordinate food distribution activities carried out in the neighborhood in teams of ~6 with the goal of feeding 100 families daily