

VATSAL K. GARODIA

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PROFESSIONAL CERTIFICATION

CFA INSTITUTE

Charlottesville, VA

Chartered Financial Analyst – Level III (Completed)

February 2023

- Relevant Courses: Portfolio Management, Economics, Equity Valuation, Fixed Income Valuation, Quantitative Methods, Alternative Investments, Corporate Finance, Derivatives, Financial Reporting and Analysis, and Ethics

EDUCATION

FORDHAM UNIVERSITY, GABELLI SCHOOL OF BUSINESS [U.S. Rank – 12]

New York, NY

MS, Finance (4.0/4.0 GPA)

August 2023–May 2025

- Honored with Academic Area Award for Excellence in Business, Economics and Finance, and named to the Dean's List
- Selected for Continuing Master's Scholarship, granted to a top performer among 1200 candidates
- Received Dean's Scholarship, awarded to top 1% applicants
- Relevant Coursework: Mergers & Acquisitions, Investment Management, Venture Capital, Python, and Financial Modeling

ST. XAVIER'S COLLEGE [All India Rank (AIR) – 6]

Kolkata, India

Bachelor of Commerce (Hons.), (3.6/4.0 GPA)

April 2018–August 2021

- Relevant Courses: Financial Analysis and Accounting

EXPERIENCE

INDEPENDENT TRADER

Kolkata, India/ New York, NY

(An independent trading and investment practice focused on Indian equities and equity/index futures & options)

Analyst

January 2026–Present

- Manage discretionary F&O trading strategies by integrating macro trends (GDP, repo rate, inflation), company fundamentals (CAGR, PAT and revenue growth, QoQ/YoY), technical indicators, and AI and Python assisted research to identify and back-test opportunities, evaluate risk-reward profiles, and optimize trade execution across a universe of 60+ stocks
- Support investment decisions across the family's equity portfolio through top-down sector analysis and bottom-up company research, evaluating valuations (absolute and relative), earnings quality, and business fundamentals to optimize portfolio positioning

SONAR CAPITAL

New York, NY

(An early-stage growth equity fund actively investing from its first fund in high-potential software companies across the U.S.)

Fellow

September 2025–March 2026

- Analyzed company-level financial and operating metrics (ARR, CAC, churn) to assess cash flow generation, working capital dynamics, and liquidity profiles during due diligence
- Built dynamic financial models to evaluate cash flow forecasts, liquidity runway, and capital requirements under multiple scenarios, supporting investment and financing decisions
- Performed cap table and scenario analyses to support pro-rata investment opportunities, distilling key financial and operating insights into investment committee materials that supported follow-on investments in 2 portfolio companies

ARC VENTURES

New York, NY

(A venture fund with LP investments in over 70 venture funds and a direct portfolio of more than 80 startups across North America, EU, and Israel)

Venture Analyst Intern

October 2024–August 2025

- Supported due diligence on early-stage investments by preparing 15+ memos assessing team, product, market size, competitive landscape, differentiators, and GTM strategy for investment committee review
- Prepared monthly fund deployment agendas covering 20+ prospective investments, evaluating GP pedigree, portfolio construction, past track records, to support capital allocation decisions, under mentorship of Principal
- Collaborated directly with Partner to monitor equity portfolio of 70+ public companies, analyzing earnings reports, management guidance, and corporate actions to inform reallocation decisions and portfolio strategy

NEEDCAPITAL.AI

New York, NY

(An AI-driven fundraising platform with a matching engine that connects qualified investors directly with curated early-stage investment opportunities)

Venture Analyst Intern

June 2024–July 2024

- Assisted in valuation analysis of 5+ early- and growth-stage companies by sourcing comparables from PitchBook and Crunchbase, and evaluating trading multiples, market data, and macro trends using Bloomberg and Capital IQ to assess pricing and investment risk

FUTURES FIRST

Kolkata, India

(A proprietary trading desk engaged in futures trading across global interest rate markets (U.S., EUR, AUS) and commodity markets, including energy and metals)

Market Analyst Intern

May 2023–July 2023

- Contributed to quantitative analysis on Euribor interest rate futures using macroeconomic indicators, volatility modeling (implied volatility, MOVE Index), and time-series techniques including GARCH to assess rate sensitivity and exposure
- Evaluated spread, butterfly, and de-fly strategies, to support trading decisions across ~\$0.25M in exposure, generating ~9% returns

TECHNICAL SKILLS

- Valuation and Trading Strategies: Equity, Fixed Income, Derivatives
- Venture/Growth-Equity: Due Diligence (Memo Writing + Power Point Presentations), Cap Table Analysis
- Financial Analysis: LBO Modeling, Discounted Cash Flow, Market Comps, Precedent Transaction, Sensitivity & Scenario
- Software: Microsoft Office Suite, Tally ERP, Qualtrics, IBM SPSS, Python (NumPy, Pandas, Statsmodels), Addepar, Affinity