

SURAJ MEHETRE

INVESTMENT/ASSET MANAGEMENT/ MIDDLE OFFICE

Dublin, Ireland • +353 892 612 972 • [Email](#) • Immediately Available • Portfolio : [Website](#)

SUMMARY

Finance professional with **3.5 years of financial services experience** and strong knowledge of Trade Lifecycle, fixed income instruments, derivatives, and investment operations. Currently serving as Investment Analyst at SSP, Dublin, performing post-trade reconciliation and trade documentation review while producing performance attribution reports across equity, fixed income, and multi-asset mandates. Proficient in Bloomberg and Refinitiv Eikon; advanced Excel with VBA automation. Solid understanding of trade flow management, settlement processes, and OTC instrument types across bonds, FX, and swaps.

PROFESSIONAL EXPERIENCE

Investment Analyst	Apr 2025 – Present
Service Select Partner (SSP) Dublin	
• Performed daily post-trade reconciliation and trade documentation review across equity, fixed income, and multi-asset mandates, ensuring accuracy between internal records and source data before reports reached portfolio managers. • Built and maintained DCF models and scenario analyses for investment committee presentations, supporting decision-making across fixed income and multi-asset strategies. • Produced structured daily performance attribution reports and market update summaries using Bloomberg, translating macroeconomic developments into portfolio-level insights for portfolio managers. • Supported trade break identification and resolution as part of post-trade workflows, coordinating across teams to maintain data integrity across all active mandates.	
Investment Analyst	Jan 2024 – Aug 2024
DssWorld Pvt Ltd Mumbai	
• Prepared pre-meeting investment presentation decks and portfolio performance summaries for Investment Manager-led client meetings, covering fixed income, equity, and multi-asset holdings. • Delivered investment performance analytics for a book of 10+ client portfolios using Bloomberg and Excel, ensuring accuracy and timely delivery. • Prepared fact-find documentation and trade support materials in line with suitability and regulatory requirements, supporting compliant client onboarding and trade execution.	
Finance Internship (Investment Team)	Jun 2022 – Dec 2023
DssWorld Pvt Ltd Mumbai	
• Built three-statement financial models and DCF frameworks to support investment analysis, delivering scenario modelling outputs with under 7% forecast variance. • Conducted pre- and post-cashflow analysis across multiple client portfolios using Excel, producing modelled outputs used in investment committee presentations. • Automated recurring financial reporting workflows using Excel VBA, reducing manual production time by 20+ hours per month and improving data consistency across client reports.	

SKILLS

Fixed Income & OTC Trade Processing	Trade Capture & Settlement Support	Bloomberg & Refinitiv Eikon
Performance Attribution & Reporting	Portfolio Management Support	Advanced Excel & VBA
Bonds, FX, Derivatives & Swaps	Multi-Asset Portfolio Analysis	Broker & Counterparty Liaison

EDUCATION

MSc Finance Dublin City University (DCU)	2024 – 2026
Corporate Finance · Financial Statement Analysis · Asset Pricing · Risk Management · Derivatives · Quantitative Methods	Thesis: 1,789 companies
Thesis: ESG Performance & Firm Valuation — analysed 1,789 companies (7,500+ firm-year observations) across five global exchanges using Bloomberg and Refinitiv Eikon.	
BEng Instrumentation Engineering Mumbai University 2018 – 2022 1st Place, IEEE Technical Event	

PROFESSIONAL QUALIFICATIONS & CERTIFICATIONS

CFP Investment Planning Module — Passed · CFP Retirement & Tax Planning Module — Passed · CFP Risk & Estate Planning — In Progress · CFP Final — PASSED · QFA — In Progress
Additional Training: Trading Financial Instruments: Equity & Derivatives · Financial Modelling & Valuation (Jobaaj Learning) · Power BI (Skill Nation) · Python for Finance (DataCamp) · McKinsey Forward Programme · Goldman Sachs Risk Job Simulation