



Anil Kumar, CFA

FINANCE/INVESTMENT
INSTRUCTOR

SKILLS

Portfolio/ Wealth Management



Financial Education Training



Equity Research



Valuation



CREDENTIALS

- CIPM certification from CFA Institute, USA, 2019
- Executive Program in M&A and Corporate Restructuring at IIM, Bangalore, 2018
- CFA (US) Charter Holder, CFA Institute, USA, 2010
- CAIA (Chartered Alternative Investment Analyst), Alternative Investments, USA, 2007
- PRM (Professional Risk Manager), PRMIA, USA, 2006
- CFP (Certified Financial Planner), Financial Planning, FPSB, INDIA, 2005
- B. Tech Mechanical Engineering, IIT Madras, 1994

PROFESSIONAL PROFILE

With over 17 years of professional financial experience in areas such as portfolio management, private equity, mergers & acquisitions, equity research in the GCC, and global industries - Anil is a highly qualified financial instructor.

Anil holds a Bachelor's Degree in Mechanical Engineering from the esteemed Indian Institute of Technology. Garnering a passion for financial analysis, he successfully completed several professional certifications in finance and investment. Specializing in professional finance/investment certifications such as CFA, CAIA, and CIPM, Anil draws from his extensive experience and knowledge to focus on delivering results.

Along with significant work experience in respected financial institutions and corporations Anil aims at facilitating his financial know-how upon aspiring learners.

He is a judge of the prestigious CFA Research Challenge for EMEA region. He is an active participant in regional and international investment conferences.

WORK EXPERIENCE

Senior Wealth Advisor - National Bank of Oman, Muscat, Oman
(May 2019 - present)

Senior Investment Advisor - Al Meera Investments, Muscat Oman
(October 2018 - April 2019)

Head of Asset Management - Ahli Bank SAOG, Muscat, Oman
(June 2016 - August 2018)

Head of Asset Management - The Financial Corporation SAOG (FINCORP), Muscat, Oman
(April 2008 - March 2016)

Equity Research Associate - Sutherland Global Services, Mumbai, India
(October 2007 - March 2008)

Team Lead - Integreon, Mumbai, India
(April 2006 - September 2007)