equaliFi

valuefy

presents

India's Top Women in Finance 2023

Premier Membership Network for Financial Services Professionals

Equalifi (erstwhile AIWMI) is a global membership network of financial services leaders, professionals and aspirants. Equalifi has been set up as a continuing education & professional development platform meant to offer its members, opportunities to earn professional designations; to participate in multidisciplinary knowledge initiatives, enable networking at conferences; and offer one single platform for interaction, cross-pollination of ideas and collaboration.

Equalifi provides the opportunity for finance practitioners and related professionals to connect and advance their focused area of practice. Equalifi aims to benefit the practitioner, their area of specialization, the clients they serve, and the industry at large.

Equalifi plays a key role in guiding the development of the financial services sector. Equalifi works with key industry participants' viz. the Government, the Regulators, the Industries/Associations, the Corporate, the Media and the General Public to achieve its objectives. Besides enhancing technical competence and professionalism in the industry, Equalifi organizes various national and international facilitates discussions to promote best practices in leadership and talent development in the financial sector with an aim to become world's premier-most center of excellence for financial services professionals.

Charter Membership

An exclusive, by-invite membership for Thought Leaders, Entrepreneurs and Prominent CXOs working in the Financial Services Sector.

Professional Membership

A prolific membership for career-oriented professionals working in the financial services and allied sectors.

Virtual Member

An exciting membership for finance students and professionals who are looking for continuous education and professional development.

Welcome

Aditya Gadge
Founder & CEO - Equalifi

"Leadership is an action not a position."

We are extremely excited to present to you the 3rd edition of our Power List "India's Top Women in Finance-2023".

Equalifi (erstwhile AIWMI) launched various initiatives under its Women in Finance Special Interest Group (SIG) in 2017 to promote gender equality in the Indian financial services industry. In 2019, India's Top Women in Finance campaign was launched to identify and acknowledge prominent women professionals working in financial services sector across 4 categories. The campaign now has more 200 women leaders as members from the first 2 editions covering the entire cross-section of the Indian BFSI sector. The 3rd edition of this campaign that we are presenting to you here will continue to promote the excellent work being done by women professionals in finance and support increase in women empowerment and higher female representation in senior management.

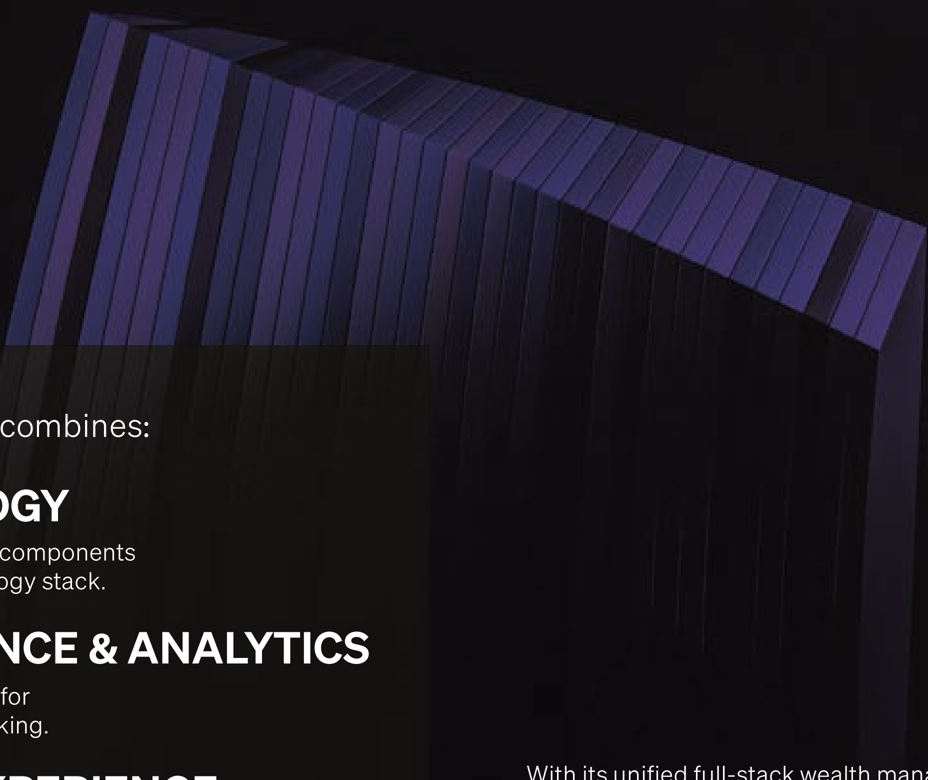
Like other sectors, women have been underrepresented at all levels of the Indian financial system, from working professionals to board members and regulators. However, things are slowly but surely changing. A new study at the IMF finds that greater inclusion of women as users, providers, and regulators of financial services would have benefits beyond addressing gender inequality. Narrowing the gender gap would foster greater stability in the financial services system and enhance economic growth. It could also contribute to more effective monetary and fiscal policy.

More inclusive financial services sector and a higher share of women on boards of financial services organizations and regulators can lead to greater stability.

We truly hope the Equalifi community is able to make a significant contribution to this onward and upward journey of the Indian financial services sector.

BREAKING SILOS IN WEALTH MANAGEMENT.

Wealth in a Box is an innovative, configurable, and one-of-a-kind platform built for investment managers, asset managers, and private banks. It streamlines the entire process of wealth and investment advisory, from client onboarding to transactions, performance reporting, and revenue management.



Wealth in a Box combines:

TECHNOLOGY

Front-to-back office components on the latest technology stack.

DATA SCIENCE & ANALYTICS

Data-driven insights for smarter decision making.

DIGITAL EXPERIENCE

Modern, intuitive and user friendly.

With its unified full-stack wealth management platform, Valuefy is poised to make the practice of siloed front, middle and back offices a thing of the past.

As India's Top Women in Finance take center stage, let's take a moment to celebrate their incredible achievements and the positive change that's happening toward greater inclusivity and diversity in the industry.

With this year's ITWIF23, Equalifi brings together diverse voices to share and inspire, illuminating the invaluable contributions of women in the financial sector. We, at Valuefy, take great pride in our commitment to creating a positive and diverse environment and are honored to be the presenting partners for this important event.

We believe that creating a workplace where everyone feels valued and included is essential to our success and the success of the industry as a whole.

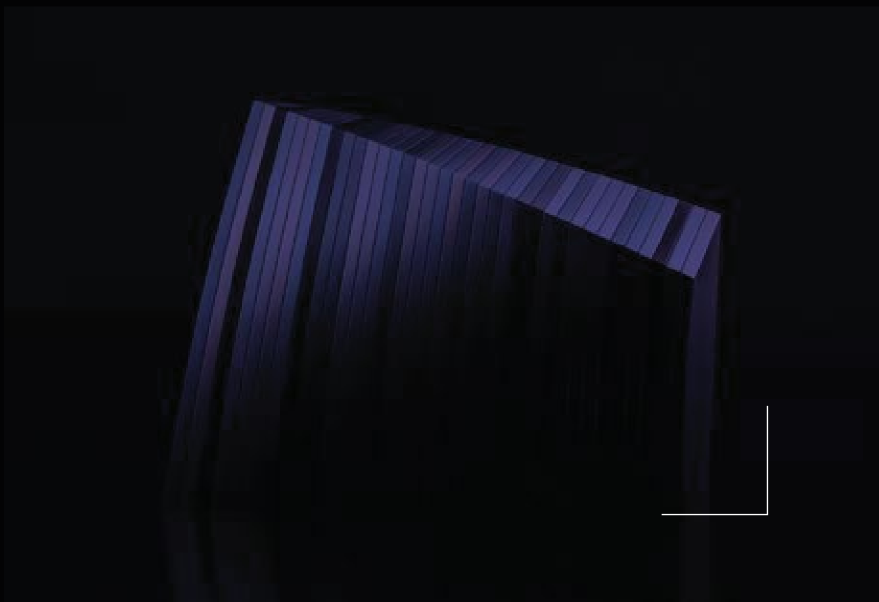
As we embrace diversity , we stand tall, together.
As we make community our mission, we push boundaries further.
When we amplify the voices of women, we fostercamaraderie and growth.
When we push the limits of possibilities, we learn better.

At Valuefy, we proudly affirm that women are not only resilient, but also exceptional contributors to our success. As we have evolved from a humble garage startup to a dependable wealth-tech provider in Asia and Europe, we have seen firsthand the dedication and passion that women bring to their work. With women currently driving 25% of the innovation in our products, we firmly believe that their valuable perspectives and expertise are fundamental to achieving our vision of becoming the premier tech infrastructure for wealth managers.

Let us enable equal standing till the last mile, let's #CelebrateWIF

In gratitude and good faith,

Team Valuefy



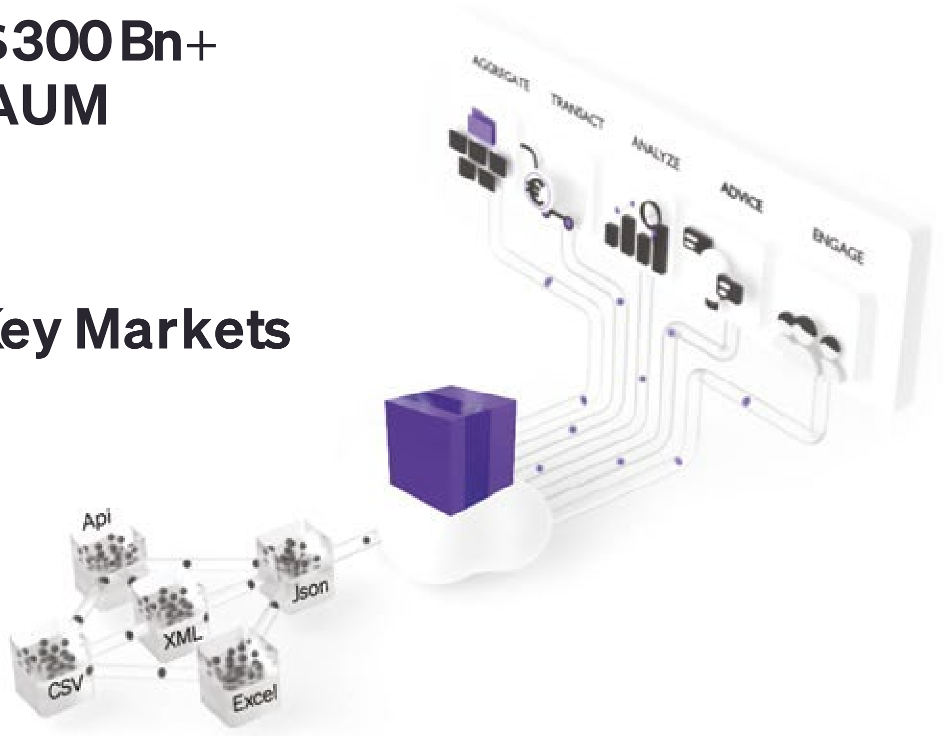
valuefy

Bettering the Way the World Invests

Valuefy is a global WealthTech company, offering comprehensive, robust, and streamlined solutions for investment managers, asset managers, and private banks. It enables them to manage their investment portfolios more efficiently with state-of-the-art technology solutions.

Founded 2010 | **$300 Bn+ AUM**

75+ Integrations | **5 Key Markets**



For a modern, agile wealth management, they combine:

Robust Technology

Data Science & Analytics Expertise

Intuitive Digital Experiences

With their Wealth in a Box technology infrastructure, they deliver real-time insights and analysis, helping advisors make informed investment decisions and stay ahead of the curve.

With a global presence and a deeply-rooted technological expertise, Valuefy is uniquely positioned to help clients navigate the complex and ever-changing world of investment management.

equaliFi

valuefy

presents

India's Top Women in Finance 2023

Equalifi's "India's Top Women in Finance" campaign now in its third year is a campaign designed to identify the most successful and respected women professionals working in the areas of finance, financial services, financial education & financial journalism.

Although the Indian financial services sector has made great strides toward a gender-balanced workforce in the last decade or so, there is still a long way to go. This campaign aims to encourage outstanding women leadership in the industry and groom future leaders.

Women professionals who are featuring in this list are talented, resilient, ethical, strong, and will have grit. They will be the ones who are inspiring their professional network to learn and grow. They are the ones who have faced professional and personal challenges and have come out victorious with a stronger sense of purpose and drive. The relentless pursuit of excellence will be a common trait amongst all of them.

These women represent a tribe that crosses industry, public and private companies, and roles in finance. The impressive credentials of the women on this list place them among some of the most influential business leaders in the country. Despite consistent barriers to entry, these women continue to use their leadership prowess to manage the bottom line but also to shape the direction of future generations of business leaders.

Winners

Ami Shah
Sr Assistant Editor
ET Prime

Amrita Arvind Divay
Head of Sales, India
Apex Group

Ankita Pathak
Economist & Product Manager
DSP Investment Managers

Binitha Manohar Dalal
Founder and Managing partner
Mt K Kapital

Chavvii Prabakar
Founder & CEO
Global Indian Solutions

Disha Chhabra
Sr. Manager, Mergers & Acquisitions
Coca-Cola India

Ghazal Jain
Fund Manager
Quantum Asset Management Company

Kavitha Narayan
Senior Research Analyst
Morningstar India

Kavitha Vijay
Senior Partner
IC Universal Legal, Advocates and Solicitors

Khushboo Shashikant Gada
Senior Manager - Product & Market Research
IDFC FIRST Bank

Kiran Agarwal Todi
CFO
Aavishkar Group
Ashv Finance Limited

Leelavathi Naidu
Partner - Regulatory and Asset Management Practice
IC Universal Legal

Maanvi Ahuja
Principal
CPP Investments

Madhusmita Panda
Chief Marketing Officer
KredX

Manju Mastakar
Managing Director
Armstrong Capital &
Financial Services

Meenal Gupta
Director
American Express

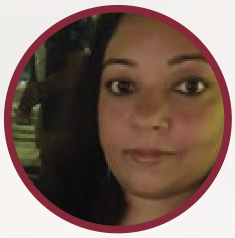
Minal Kabra Malpani
Associate Director
Unifi Capital

Misha Sharma
Practice Head, Household
Finance Research
Dvara Research

Mitali Joshi
Offshore Product Head
HDFC Bank

Mridula Iyengar
Compliance Officer | Head of
Regulatory Affairs & Legal
Sanctum Wealth

Mrin Agarwal
Director
Finsafe India



Mukti Seth
Senior vice President -
investment products
Motilal Oswal wealth limited

Nehal Shah
Head Compliance Legal
and Company Secretary
CARE Ratings

Nidhi Sharma
Head- Treasury and
Family Office
International Tractors

Nirali Solani
Head
Chona Family Office

Nisha Chonkar
Head Client Servicing
Nuvama Custodial
Servicies

Paras Nayyar
Chief Finance Officer and Managing Director
True North

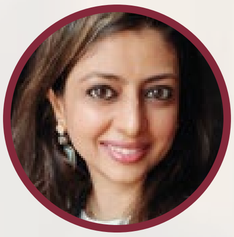
Payal Jain
Principal
LoEstro Advisors

Priyanka Acharya
Founder
LaxmiGyaan™

Rajul Kothari
Partner
Capital League

Renu Maheshwari
Co Founder and Principal Advisor
Finscholarz

Riya Oswal
Product Head - Alternate Investment Fund
Purnartha Investment Advisors



Rucha Joshi
Director and Head Legal India
Rabobank

Ruchika Agarwal
Assistant Professor
NMIMS

Ruchika Agrawal
Principal
KKR

Rupa Rajul Vora
Director & Member of the Board
India Alternatives Investment Advisors

Sakshi Jaiswar
Financial Associate
Wealth Café Financial Services

Sandhya Upadhyay
CFO
Aditya Birla Sun Life Pension Management Limited

Sangeeta Biby
Vice President
SBI CapVentures

Seema Chaturvedi
Founder & Managing Partner
AWE Funds

Shikha Vageria
Sr. Product Manager
Axis Asset Management Company

Shilpa Avadhoot Samant
Senior Manager
SBISG Global securities services

Shweta Laddha
Vice President and Head
Compliance & Secretarial
Multiples Alternate Asset Management

Shweta Rai
Vice President
Business Excellence
International Money Matters

Sonu Bhasin
Family Business Historian
Independent Director
Business Author
Founder and Editor-in-Chief
Families & Business

Sujata Seshadrinathan
Director- IT & Process
Basiz Fund Services

Swati Bhartia
Principal
Motilal Oswal Private Equity

Vidya Iyer
Head of Credit and
Senior Fund Manager
ICICI Prudential Life Insurance

Vinutaa S
Vice President and
Sector Head
ICRA

Ami Shah

Senior Assistant Editor
ET Prime

Progressing

Ami is a financial journalist with nearly 18 years of experience, spanning leading newspapers, news wires and the digital space. A finance professional by training and a journalist by choice, she has written extensively across beats in the financial sector, and has been focusing on Indian equity markets over the last decade.

She has been at the forefront of news reporting in a fast-paced real-time news environment, and over the years her writings have spread over news, views and opinion to long-form stories.

She has to her credit an enriching career in journalism in Mumbai and a brief stint in New York that include esteemed brands such as Reuters, Mint and The Economic Times. She is currently the Senior Assistant Editor – Markets at ET Prime.

Ami is also an aspiring author, and is currently working on her first book.

A book Ami highly recommends-
Atomic Habits by James Clear

Amrita Arvind Divay

Head of Sales, India
Apex Group

Progressing

Amrita Divay is Head of Sales, India for Apex group, a global financial solutions provider, servicing nearly USD 3 Tn in assets across 85 locations. In her role she spearheads identification, validation & conversion of new business opportunities driving revenue and market growth along with visibility for the Apex brand. She is passionate about bringing global best practices to the fund administration industry in India, driving professionalization and expansion in related services.

In a career spanning nearly 2 decades, she has held leadership roles with both domestic and international financial institutions and has worked across diverse client segments like market infrastructure institutions, market intermediaries, global/domestic asset managers and banks, acquiring functional proficiency in trade & post trade operations, funds setup and operations, forex, client onboarding and global standards like ISO 20022.

Her previous employers include global financial communications network, SWIFT, where as Head of Capital Markets for India & South Asia, where she was responsible for Strategy and Business Development of the Securities & Treasury business for SWIFT in the region. In her role, she also worked with the local securities markets regulator to drive the adoption of International Standards in India, garnering valuable experience in driving policy & industry changes as part of her role with SEBI's Market Data Advisory Committee and SWIFT Industry Working Groups.

She has completed her Advanced Management Program from the Indian Institute of Management, Bangalore and holds a PGDBM from K J Somaiya Institute of Management Studies and Research.

A book Amrita highly recommends-
Little Women by Louisa May Alcott

Ankita Pathak

Economist & Product Manager
DSP Investment Managers

Promising

Ankita looks after Products and Macro at DSP Investment Managers. She has utilized her passion for macroeconomics to drive meaningful investments. In her previous role in a leading wealth management firm, she has played a pivotal role in providing macro-research inputs to institutions, family offices, HNIs etc. Armed with Economics degree from Lady Shri Ram College, she went on to be a Commonwealth Scholar at University of Warwick. Her forte is centred around picking top-down themes for investing and she is passionate about increasing the reach of macroeconomics in financial decision making. Ankita has keen interest in policy and has worked with NITI Aayog. Ankita has been extensively covered in Times of India, Economic Times, Mint, Moneycontrol, Bloomberg Asia TV etc. She's also among the 'Most Influential Young Economist', an award instituted by ICCE. Ankita actively champions the cause of 'Women in Finance' and is an active member of Bloomberg's Women Buy-Side Network. She is also an active contributor to financial literacy of underprivileged women through multiple initiatives

A book Ankita highly recommends-
How the World Works? by Vaclav Smil

Binitha Dalal brings 15+ years of financial investment & development expertise coupled with leadership experience. Known as one of the youngest industry leaders to have joined the Rustomjee Group, she has been an integral part of the Finance Management and Fund Raising for the Group. Over the years, Binitha has been actively involved in key strategic fund raises and partnerships for the group and has had the good fortune to work across the various functions of development and finance for the group. Binitha is the Founder and Managing Partner of Mt K Kapital, a real-estate focused fund management company. Along with being an industry veteran, Binitha is also an Angel Investor and Convener for Banking & Finance at CREDAI National as well as Joint Secretary at CREDAI MCHI.

A book Benitha highly recommends-
The 5am Club by Robin Sharma

Binitha Manohar Dalal

Founder andManaging partner
Mt K Kapital

Progressing

Chavvii Prabhakar

Founder & CEO
Global Indian Solutions

Leading

Chavvii Prabakar is a senior financial services professional with over 20 years of extensive experience in NRI Banking, Wealth Management and Private Banking with premium organizations such as Citibank, Societe Generale Private Banking, American Express Bank, Standard Chartered Private Bank and Axis Bank. She has a successful track record of building new businesses, creating and leading large diversified multifunctional teams.

Chavvii is a woman entrepreneur now and founded Global Indian Solutions – an integrated solutions provider for the Pravasi Bharatiyas (NRIs) who are seeking assistance in managing their assets in India and require a trusted partner.

She is an Independent Director on the Board of Shyam Telecom Limited and Globus Power Generation Limited.

She has been elected to the Managing Committee of Delhi Management Association since 2020 and has been the Chairperson, Finance Committee. She has won the prestigious “DMA All India Women Entrepreneurs Award 2020”

A book Chavvii highly recommends-
THE SECRET by Rhonda Byrne

Disha Chhabra is a seasoned finance professional with 15+ years of industry experience in the field of investment banking, corporate mergers & acquisitions.

She entered this field in 2008 as an analyst to the current day, where she is driving and managing mergers & acquisitions for market leading ready-to-drink beverage player (Coca-Cola India), is truly a testimony of her strong will power to fight all odds, commitment to growth, and dedication towards the function.

She has gained rich and diversified experience over the years working with leading corporations including Deloitte, HSBC, Bharti Airtel, Pernod Ricard, and Coca-Cola. She has built a strong skill set around end-to-end deal execution, valuation, legal aspects, strategic and financial assessment. Some of the notable accomplishments include being instrumental in the end-to-end execution of over 15 large transactions and leading some of the large acquisitions by Bharti Airtel and one-of-a-kind investments by Pernod Ricard.

A book Disha highly recommends-
The Seven Habits of Highly Effective People by Stephen R. Covey

Disha Chhabra

Senior Manager-Mergers
& Acquisitions
Coca-Cola India

Progressing

Ghazal Jain

Fund Manager
Quantum Asset Management Company

Promising

Ghazal Jain has more than 5 years of experience in the field of Finance and Alternative investments. Over her career, she has gained multi-asset exposure by helping manage the Gold ETF, Equity Fund of Funds and the Multi asset funds at Quantum. She is a regular contributor to leading Finance and Business dailies. Ghazal joined Quantum in 2019 and has completed her MBA in Finance from the School of Business Management (SBM), NMIMS, Mumbai. She religiously follows Warren Buffett's two rules: Rule No. 1: Never lose money. Rule No. 2: Never forget rule No. 1.

A book Ghazal highly recommends-
The Psychology of Money by Morgan Housel

Kavitha Narayan

Senior Research Analyst
Morningstar India

Progressing

Kavitha Narayan is a senior manager research analyst at Morningstar India and covers funds across equity as well as fixed income. She has over 17 years of work experience within the financial services industry and has taken on assignments in India as well as UK. She also works closely with the media and has authored articles for various print and online magazines and newsletters. Her views and opinions are also reflected as part of her research-based articles, videos and reports on the Morningstar website. Outside of work, Kavitha enjoys travelling, reading, and taking on DIY projects. She is also involved in a lot of philanthropic activities, both at work and outside.

A book Kavitha highly recommends-
Lean in by Sheryl Sandberg

Kavitha Vijay

Senior Partner
IC Universal Legal, Advocates and Solicitors

Leading

Kavitha is a senior partner of IC Universal Legal, based out of the Chennai office, since 2006.

She started her career in Mumbai at Crawford Bayley under Mr. Suresh Talwar in September 1998 in Mumbai.

Thereafter, she joined IC Universal Legal as an associate in 2006 when the firm started its corporate office in Chennai with a 2 member team and have been heading the Chennai office since 2010 June. Being a small member team at the start of the Chennai operations, she was involved in varied assignments providing her the platform to literally 'find her feet' in the legal fraternity in Chennai. Today, the Chennai team is 35 members strong handling corporate law, real estate, litigation and intellectual property, mergers & acquisitions, private equity.

A book Kavitha highly recommends-
Like the Flowing River by Paulo Coelho

Khushboo has been a part of the Wealth Management industry for the last 8 and half years. She is a Commerce Graduate from R.A.Podar College of Commerce & Economics, Certified Financial Planner and has recently cleared CFA Level II. Completing CFP along with Graduation, she immediately started working with a SEBI Registered Investment Advisor. Spending around 3.5 years working as Para Financial Planner with boutique financial planning firms, she decided to explore new opportunity and look for exposure at a larger set up. That is when she joined IDFC Bank in mid of 2018 in Wealth Management, which is now IDFC FIRST Bank.

A book Khushboo highly recommends-
A Gift To My Children by Jim Rogers

Khushboo Shashikant Gada

Senior Manager - Product & Market Research
IDFC FIRST Bank

Progressing

Kiran Agarwal Todi

Chief Financial Officer
Aavishkar Group/ Ashv Finance Limited

Leading

A focused professional with over 20 years of exposure in the financial services industry, providing strategic financial direction to various functions to deliver sustainable profitable growth and quality returns to all the stakeholders.

In her current role with the Aavishkaar Group, Kiran has been instrumental in turning around the MSME lending business to a road of profitability and sustainable growth. She is responsible for partnering with the CEO in business decisions to drive business goals and provide strategic financial direction to maximize the value for all the Stakeholders.

Prior to this, Kiran has been a key founding member for Home First, a housing finance company in the affordable segment. Worked closely with seasoned professionals like Mr. Jaithirth Rao, Mr. P S Jayakumar and Mr. Rajiv Sabharwal. She has been instrumental in the first level growth of the Company and in scaling it to an AUM of Rs 2,500 crores. Started as the Head-Finance and the second to CEO in 2012, scaled the organization to an employee strength of 700 strong members when she moved out in December 2018.

A Blog Kiran highly recommends-
Mindvalley

R. Leelavathi Naidu is a Partner with IC Universal Legal and oversees the firm's Private and Public Funds, Asset Management and Regulatory practice at its Mumbai office.

She has advised various domestic fund managers on formation and registration of alternative investment funds (including private equity funds, hedge funds, venture capital funds, debt funds and so on), and drafting, and negotiation of associated documentation. She also assists in structuring the India focused offshore funds including funds in GIFT City and other jurisdictions. She also has wide experience in advising investment advisers, portfolio managers, mutual funds on registrations, reporting and documentation.

She is also very active in advocacy for various regulatory matters and works alongside various associations and intermediaries. She is currently the chairperson for the AIF advocacy committee for Equalifi (Earier known as AIWMI).

Prior to her stint with ICUL, Ms. Naidu was Vice-President at Avendus Capital leading their Compliance function for the asset management services including offshore funds, AIFs and PMS. Prior to that she held leadership positions in legal-compliance departments of IIFL Asset Management, IDFC Asset Management and Principal PNB Asset Management.

She holds a Masters in Commerce degree from University of Mumbai, Company Secretary from Institute of Company Secretaries of India and Bachelor in laws from KC Law College Mumbai. She is also a Certified Anti Laundering Specialist (CAMS) and Certified Global Sanctions Specialist (CGSS).

She was recognized as one of the 'Top 40 under 40' Alternative Investment Professionals in India by the Association of International Wealth Management of India (2020). She was also recognized as '40 under 40' compliance professionals at Compliance 10/10 (2020).

A book Leelavathi highly recommends
Can't hurt me by David Goggins

Leelavathi Naidu

Partner - Regulatory and
Asset Management Practice
IC Universal Legal

Progressing

Maanvi Ahuja

Principal
CPP Investments

Progressing

Maanvi is a Principal in the Infrastructure and Sustainable Energies Investments team at CPP Investments in India, based out of the Mumbai office. Responsible for investments in Sustainable Energies, she focuses on investments in energy transition, with a strong presence in renewable generation and emerging green technologies. As the first member of the group in India, Maanvi helped shape the investment strategy ultimately leading to one of the largest investments (above US$1bn) in this space. She also actively participates in industry forums and discussion groups to exchange ideas with various market participants.

Prior to joining CPP Investments in 2019, Maanvi was a Vice President at Barclays Capital. She was a part of the Investment Banking team focusing on large cap clients in India Infrastructure space, having worked on transactions totalling over US$ 2.5 billion across M&A advisory, equity and debt capital raise advisory and balance sheet lending. She has earlier worked with UBS and Deutsche Bank.

Maanvi holds an MBA from IIM and a Bachelors in Commerce from SRCC. She is also a CFA Charter holder.

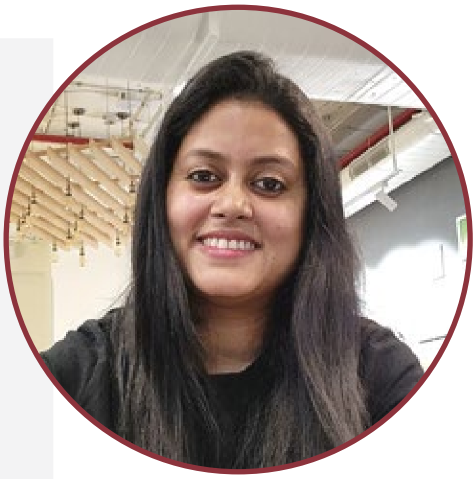
A book Maanvi highly recommends
Principles by Ray Dalio

Marketing as a function is often written off as frivolous but as a professional with over a decade of experience, across the biggest tech players in the world and smaller innovating start-ups, Madhusmita describes her self as a ‘value creator’. As the Chief Marketing Officer at KredX, a multi-product fintech powerhouse, She responsible for driving awareness, revenue and a positive impact on the bottom line. Madhusmita also handle large global partnerships and leading a new B2B payments product line for over a year now. A masters degree in Marketing, experience in sales and a stint as a full-time entrepreneur, have contributed to her role as a CMO in the fintech space with global ambitions. Her experience has led to a worldview that is holistic and my superpower is hustling and never being afraid of uncharted territory.

Apart from contributing to her organization's success she have also had the privilege of mentoring younger colleagues across teams and helping them achieve their full potential. Madhusmita have been a part of multiple research projects and whitepapers focusing on alternative financing and financial inclusion for the SME, MSME & Enterprise segment.

Beyond her corporate commitment she also involved in consulting (pro-bono) and helping small businesses without budgets to scale business through the power of funnel management and marketing. Madhusmita strongly believe that we all have a responsibility to make the world a better place, and she committed to doing my part. Madhusmita would definitely define my journey as purpose driven and unrelenting.

A Blog Madhusmita highly recommends
Mindvalley



Madhusmita Panda

Chief Marketing Officer
KredX

Progressing

Manju Mastakar

Managing Director
Armstrong Capital & Financial Services

Leading

Manju Mastakar is an accomplished finance maven passionate about building investment plans and driving financial independence. Over the course of her 22 years in the industry, she has acquired extensive knowledge, demonstrated diligent client commitment, and received several awards and recognitions.

Manju Mastakar's success story is rooted in her tenacity and depth of financial knowledge, which she developed while working as an intern for a Chartered Accountant in Dalal Street in the early 2000s. From Assistant Accountant to Dealer, Account Manager, Portfolio Manager, and eventually Regional Manager, Manju's ascent up the corporate ladder was based on her insatiable desire to learn.

She relocated to Bangalore in 2007. It was during the financial crisis of 2008, when she lost her job, that Manju decided to explore entrepreneurship. Armed with extensive financial subject experience and good multitasking skills, she founded Armstrong Capital & Financial Services Pvt. Ltd., an investment solution firm that offers a complete spectrum of wealth management services to its clients. Since its inception in 2010, the Bangalore-based firm has served over 1,000 satisfied clients and has become a trusted name in the wealth management industry.

A book Manju highly recommends

"The Psychology of Money: Timeless Lessons on Wealth, Greed, and Happiness" by Morgan Housel.

Meenal Gupta

Director
American Express

Leading

Meenal Gupta is Director at American Express with over 10 years of experience working closely with leading financial institutions in the country to promote financial inclusion, digital innovation, and solve for credit and fraud risk in the lending business. In her role as a consultant, she has advised several leading organizations across the globe on business development and has worked on adoption of analytically/ empirically driven solutions.

Meenal holds a PGDM degree in Finance & Analytics from NMIMS University and BBA degree in Finance from AMITY University.

Meenal vehemently volunteers towards social development by ways of contributing to several causes, mentoring underprivileged aspiring professionals, and engaging in numerous social activities to make this world a better place.

A book Meenal highly recommends

'Find Your Why' by Simon Sinek

Minal has been part of the wealth management industry since the past 15 years. She started her career with a stock broking firm as an intern and fell in love with equities. Immediately after her post graduation, her first role was in managing the proprietary arbitrage book, where she was the youngest person in the organization who was managing assets worth 1000+ crores, apart from managing a team since the start of her career at an early age of 23. Her thirst for knowledge made her take on more challenging client centric roles, with a motive to make a difference in people's life, with IIFL Wealth. She was actively involved in researching and creating equity portfolio's for UHNI investors, family offices and treasuries. After spending a considerable time with marquee organizations like IIFL Wealth, Motilal Oswal Wealth Management, Aditya Birla Group, she is now spearheading key institutional relationships at Unifi Capital.

Minal Kabra Malpani

Associate Director
Unifi Capital

Progressing

A book Minal highly recommends-
Conquering the Chaos: Win in India, Win Everywhere by Ravi Venkatesan

Misha leads the Household Finance Practice at Dvara Research. In this role she focuses on identifying key research gaps in the field of Household Finance and building evidence to inform market practices and design of financial sector policy. Misha specializes in policy research and advocacy in the domain of financial inclusion.

She has several years of experience working with the financial inclusion vertical at IFMR LEAD where she managed two large scale trials on the impact of access to formal financial services on low-income households in rural Tamil Nadu. While with IFMR LEAD, she was awarded the CFI Accion Fellowship to research on the role of agent networks in transitioning low-income households to digital financial platforms. Prior to Dvara Research, she worked as a Senior Research Manager with the Centre for Social Impact and Philanthropy at Ashoka University, researching on the state of the Indian philanthropy sector. Misha has written several research papers and columns, commenting on the state of inclusive finance in India.

Misha holds a Masters Degree in Economics from the University of Edinburgh and a Bachelor's Degree in Economics from Stella Maris College, Chennai.

A book Misha highly recommends-
Why Nations Fail by Daren Acemoglu & James A Robinson

Misha Sharma

Practice Head, Household Finance Research
Dvara Research

Progressing

Mitali is Head Offshore Products at HDFC Bank Ltd., She has been instrumental in setting up and leading the offshore product desk for the bank. Span includes Overseas Assets under Management for USD 3.2 billion. She also leads the digital Initiatives for NR Business segment of the Bank.

She has completed her M. Com, CAIIB, CA Final (Group 2) and MBA in finance from Chetana Institute of Management & Research Bandra. She started her career with Development Credit Bank in Liability team as management trainee and moved to Canara Robeco Asset Management Company as product manager and then joined HDFC Bank in Offshore desk.

Through her professional experience of over 15 years, she has built significant expertise and knowledge with respect to end-to-end product designing, market insights, digital automations, regulatory landscapes with respect to overseas product structuring.

Mitali Joshi

Offshore Product Head
HDFC Bank

Progressing

Mridula holds a law degree from the Government Law College, Mumbai and is an Associate Company Secretary. She is a Compliance & Legal professional with over 12 years of experience in financial markets. In the ever-evolving space of compliance standards, her mixed bag of experience in both, MNCs and domestic firms, have contributed to imbibing a realistic view of how Compliance as a function can support in evolving the governance landscape, while still being business-friendly.

She currently heads the Regulatory Affairs & Legal function at Sanctum Wealth where she focuses on striking a balance between meeting dynamic regulatory requirements and high standards of client servicing. She aims to contribute towards changing the image of Compliance professionals from being restrictive to one that is enabling.

She is passionate about financial independence of women, closing the financial gender gap and bringing more women into the formal financial system. To this end she works towards educating local working groups, specifically women working in the unorganized sector.

A book Mridula highly recommends-

Grit: The Power of Passion and Perseverance by Angela Duckworth

Mridula Iyengar

Compliance Officer
Head of Regulatory Affairs & Legal
Sanctum Wealth

Progressing

Mrin Agarwal
Director
Finsafe India

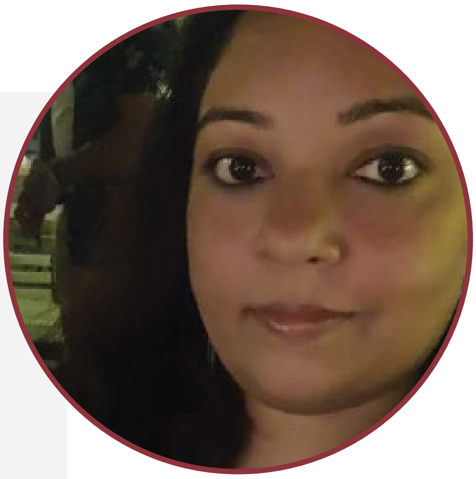
Leading

Mrin is the founder of Finsafe India Private Limited, a financial education company in the space of financial wellbeing.

Mrin has more than 25 years of experience in Wealth Management and has worked with Citibank, Deutsche Bank and Birla Sunlife. She has extensive experience in investment advisory and banking, debt and stock markets and is regularly interviewed by CNBC TV 18, ET Now, Zee Business, Bloomberg Quint etc. She regularly contributes articles to print media (including monthly columns in Mint, Moneycontrol, Deccan Herald) and is quoted by Business Standard, Economic Times etc.

She has won the CNBC Grand Jury Prize for work done towards financial education

A book Mrin highly recommends
Psychology of Money by Morgan Housel



Mukti Seth
Senior Vice President - Investment Products
Motilal Oswal Wealth

Progressing

Mukti is a diligent, passionate and persevering professional with 17 years of experience in different facets of the financial service industry with core competency in Product & Research, Strategic Projects & Advisory.

Mukti feels she is privileged to work with amazing teams/ seniors of Motilal Oswal Wealth Limited & Nippon India Asset Management along with other industry veterans. During her career span, have been a key contributor in developing proprietary investment frameworks, new product ideas, building new product platforms & business from a small scale and strategic projects related to Government. Pursuing CFA in 2018 and currently pursuing CAIA after a gap of 12 years of regular education enabled her to enhance her work knowledge.

A book Mukti highly recommends
A Flaw in Human Judgement by Daniel Kanehman

Nehal Shah

Head Compliance Legal and
Company Secretary
CARE Ratings

Leading

In her career of 18 years so far, Nehal has acquired expertise in areas of Secretarial, Compliance, legal, audit, corporate governance management, restructuring and strategic planning. Before joining CARE Ratings, she was the Head of Compliance, Legal & Company Secretary at YES Asset Management (India) Ltd. She has worked in global and domestic conglomerates such as Deutsche Bank Group, Fidelity India, and Aditya Birla Group.

She has worked in various industries within the Financial Service Sector such as asset management, portfolio management, broking, research, investment banking, investment advisory, CRA etc. She has been heading the function since a young age.

She has received various awards for her experience and contribution such as recognised in the category of 'Best Leading Lawyers of 2022' by the World Intellectual Property Forum, awarded for an "Outstanding Contribution" to Indian franchise for Deutsche Bank in India and "Excellent Performer" in Financial Service Sector by Legasis.

A book Nehal highly recommends

The Everyday Hero Manifesto - Activate Your Positivity
Maximize Your Productivity, Serve The World

Nidhi Sharma is the General Manager & Head-Treasury and Family Office at International Tractors Limited. She is a graduate in Economics (Hons) from Jesus and Mary College, Delhi and has done MBA in finance from Institute of Management Technology. After completing her post-graduation, she started her career as a fixed income analyst at Nippon India Asset Management. Post this, she joined Canara Robeco Mutual fund as a Bond Trader. In 2009 she joined ING investment management and in 2012, she was assigned as the designated Fund manager for Fixed Income and Hybrid strategies at ING Investment Management. At the age of 28, she was the youngest female fund manager in the country.

In 2018, she joined International Tractors Limited and is heading the Treasury and Family office of one of India's leading Manufacturing Companies. With a zeal to incorporate technology with investments, she completed a second post graduate diploma in Machine learning and Data Analytics from Great Lakes and University of Texas, USA in 2020.

A book Nidhi highly recommends

Atomic Habits by James Clear

Nidhi Sharma

Head- Treasury and Family Office
International Tractors

Progressing

Nirali Solani
Head
Chona Family Office

Progressing

"Nirali is currently spearheading the Chona Family Office- the founders and erstwhile owners of the mammoth Havmor Ice Cream group. She overlooks their key investment decisions across various asset classes along with managing their new venture creations, multi-generational wealth transfer, and philanthropy.

Nirali started her career as part of ASK Wealth's Investment Advisory and Family Office teams, where she spent eight years managing the wealth of UHNIs, Corporates and Trusts. She is a Chartered Financial Analyst (CFA, USA), Certified Financial Planner (FPSB, India), and a Commerce graduate. She has been awarded the best investment advisor at ASK Wealth for five years in a row.

A Blog Nirali highly recommends
CollabFund blogs by Morgan Housel

Nisha Chonkar
Head Client Servicing
Nuvama Custodial Servicies

Progressing

"Nisha is a financial services executive with over 15 years of rich experience in the Capital market with expertise in Custody Services for local and global clients. A multi-faceted, results-driven, innovative leader with end-to-end custody service management.

Currently, she is working at Nuvama Custodial Services Limited (formerly Edelweiss Capital Services Limited) as Head of Client Servicing in the Asset Services space. Nisha is responsible for leading a high performing team serving both international and domestic clients with end-to-end superior client management execution.

In the past she has worked with Standard Chartered Bank, Development Bank of Singapore (DBS), and HDFC bank Limited in the Capital Market and Custody domain.

Nisha has Bachelor's in Commerce and Masters in Management Studies (MMS) with specialization in finance from Mumbai University.

A book Nisha highly recommends
Don't Sweat The Small Stuff at Work by Richard Carlson

Paras is a Managing Director and CFO at True North, a leading private equity fund in India. Paras is responsible for overall finance, corporate governance and domestic investor relations. Over the last six years, her role has evolved extensively and she is also spearheading human resources and marketing initiatives at True North.

With more than two decades of experience in the financial services industry, Paras has held senior leadership positions across organizations such as KPMG, Fidelity International, L&T Financial Services and CRISIL. Through her professional career, Paras has built significant expertise across corporate strategy, fund structuring, treasury, mergers and acquisitions, audit services, legal, regulatory and compliance functions.

She has completed her Bachelors in Commerce from Shri Ram College of Commerce, University of Delhi and is a merit-ranking Chartered Accountant. She has also completed the Accelerated Development Program (ADP) from The Wharton School, University of Pennsylvania.

A book Paras highly recommends
Jonathan Livingston Seagull by Richard Bach

Paras Nayyar

Chief Finance Officer and
Managing Director
True North

Leading

Payal is an Investment Banker and started her career at Goldman Sachs helping manage the firm's liquidity. She is currently a Principal at LoEstro Advisors and leads their effort on PE/VC fund-raising and M&A. She is a Commerce graduate from Shri Ram College of Commerce and an MBA in finance from IIM Indore.

During her last three years at LoEstro, she has supported a cumulative deal value of INR $300Mn in fund-raising and M&A. In her latest transaction, she successfully led the sell-side mandate for iNeuron, an upskilling company which was merged with PhysicsWallah– this was one of the largest edtech acquisitions in 2022. She has advised 50+clients on growth, business planning and go-to-market strategy in edtech.

During her summer stint at a private equity fund Samara Capital, she authored a white paper and investment thesis on the microfinance sector. This experience had a profound impact on her and played a key role in shaping her later career. At Elevar Equity, Payal focussed on investing in early-stage businesses including new deal evaluation in financial services and education and portfolio management.

Payal also dedicates a lot of her time engaging with the startup ecosystem. She recently spoke at the Global Impact Summit on Preparing for the Next Big Shifts in Education. She frequently speaks at Yourstory and TiE events and advises early stage entrepreneurs on latest market trends.

A book Payal highly recommends
Farnam Street by Shane Parish

Payal Jain

Principal
LoEstro Advisors

Progressing

Priyanka Acharya

Founder
LaxmiGyaan™

Progressing

"Priyanka Acharya is a Financial Educator, a published author & a Podcaster. She has designed her mission towards financial education on the basis of her 2 post graduate degrees, 15 years of diverse finance domain experiences, her co-learning with 40000+ participants and 17 published management research papers. Her brand LaxmiGyaanTM is focused on 2 core purposes: one, building professional education for the health insurance industry and two, educating women in family finances. She has authored "Laxmi Gyaan se Laxmi Maan" - a Hindi book, as well as a one-of-its-kind LaxmiGyaan Journal (English/Hindi/Gujarati) and hosts the podcast shows "Ek Chuski Finance" & "LaxmiGyaan Library"

A book Rajul highly recommends

Let's Talk Money by Monika Halan

"Rajul is a veteran in the field of Wealth Management in the country with a career spanning over 30 years with some of India's largest and most respected financial institutions like Aditya Birla Sun Life Mutual Fund, HSBC Bank, ABN AMRO Bank, and the last 17 years as an entrepreneur at Capital League.

She has a diverse background in equity research, investment management, private wealth management, and entrepreneurship. At Capital League, which is an all-women boutique private wealth management firm, Rajul has been a Partner with the firm almost since inception and has played a pivotal role in building the organization's success and reputation for excellent wealth management services for HNIs and Corporates, distinguished clientele, exemplary customer service, and high ethical standards. The Firm has over the years won several awards including CNBC TV18 Award for Best Financial Advisor (6 times), Best Wealth Manager Experience Award, and Best Boutique Wealth Manager by Asset Triple A, Asia and SME Champion UN Women WEP Award.

A book Rajul highly recommends

The Intelligent Investor by Benjamin Graham

Rajul Kothari

Partner
Capital League

Leading

Renu Maheshwari

Co-Founder and Principal Advisor
Finscholarz

Leading

"I believe my all the above and more are only how the ecosystem has recognized my efforts. But my fulfillment comes from the cognizance that my life has proved useful to society and a few people have found peace and happiness in their lives because of my presence.

As a Founder Director of ARIA (Association of Registered Investment Advisors, a section 8 company), and one of the founding members of the CFP Professional Advisory Council for India, (of Financial Planning Standards Board, USA) I am trying to amplify the effects of my initiatives.

I believe that a man and a woman are born equal, should be treated equal and should get equal rights and opportunities. When women take care of the biological responsibility of bearing children and nurturing them, they need 'Allyship' from the ecosystem to bring them to equity in economic activities. I was lucky to have that allyship with my husband and now business partner.

Riya Oswal

Product Head - Alternate Investment Fund
Purnartha Investment Advisors

Progressing

"Riya is a Chartered Accountant and a commerce graduate from Pune University with more than 8 years in capital markets. She completed her Masters in Global Strategic Business from Manchester Business School. She has worked in global fintech start-ups before returning to India and working with Edelweiss. During the formative years of the nascent alternative regimes in India, she has had the privilege of working with market leader Forefront (Edelweiss) and managing the Edelweiss Alternative Equity Fund and Alpha Fund, which was the first AIF launched in India.

Currently she is working as a Product head– AIF at Purnartha. She has been the investment counselor representing Purnartha's Research team.She has been Instrumental in launching Purnartha's first PMS in 2020 and first AIF in 2022.

She has conducted more than 25 seminars on basics of finance across different cities like Pune, Nashik, Goa, Mumbai and Kolkata. Have contributed by writing various articles in economic times. Currently she is a visiting faculty at Indian Law College– Pune and Symbiosis.

A book Riya highly recommends

The Art of Dealing with People by Les Giblin

Rucha Joshi

Director and Head Legal India
Rabobank

Leading

Rucha brings with her over 18 years of experience across legal documentation, corporate law advisory, joint ventures, mergers and acquisitions, private equity/debt, credit, dispute resolution, civil commercial litigation, intellectual property, corporate functions and non-profits in the legal domain of India's growing banking and financial services sector. She has led legal teams and groomed several team members over the years.

Rucha began her career with a law firm and subsequently moved into an in-house counsel position. Throughout her career, she has worked with esteemed organizations such as Rabobank as Head Legal India, SBI Capital Markets as Head Legal, Edelweiss Group, Essar Group and ICICI Prudential. During her career she has garnered laurels such as Achiever Award for "40 under 40" Alternative Investments Professionals in India (2019), ALB India Law Awards where she has been nominated as a finalist under 2 categories: (i) In-House Lawyer of the Year – International (ii)Woman Lawyer of the Year – In-House in 2019 and 2023.

She volunteers her time and expertise to advise several non-profits organizations on legal aspects and also actively participates in various social service initiatives and causes focused on women empowerment education, safe water, hygiene and sanitation for marginalized communities in India.

She holds a bachelor's degree in commerce from Mumbai University and an LLB degree from GLC, Mumbai, India's prestigious and historic law school. She is a Member of the Bar Council of Maharashtra and Goa.

A book Rucha highly recommends -
Bhagavad Gita

Ruchika Agarwal

Assistant Professor
NMIMS

Progressing

Ruchika Agarwal is a Ph.D. in Management and holds a Master's degree in economics from Mumbai University. She has also done a Post Graduate diploma in Management (Finance) for which she was awarded a gold medal for her outstanding academic performance. She has done certifications in the area of Data Science from HarvardX and Johns Hopkins University. She has teaching experience of more than a decade in the area of finance and economics. Prior to that, she had worked with Evalueserve and CRISIL in the field of equity research and credit ratings. She has worked as a consultant to an Edutech firm in the area of product development and business marketing. She has also worked as a financial consultant with an FMCG distributorship firm. Currently, she is facilitating students with a family business background and who want to pursue their own start-up in the area of finance. She has also presented and published research papers at both national and international conferences and journals and won.

A book Ruchika highly recommends -
Thinking, Fast and Slow by Daniel Kahneman

Ruchika Agrawal

Principal
KKR

Progressing

Ruchika has been in the private equity investing space for about a decade. She has originated / invested / managed close to US$1.8bn of third party funds to date with deals across the capital stack and across asset classes in real estate.

She is currently a Principal in the Real Estate investments team at KKR India. Prior to this, she was a part of the investments team at SUN-Apollo ($600mm India real estate fund) and has been a part of the strategy consulting practice at PwC India.

She has a Bachelor's degree from IIT Bombay and 3 Masters degrees (one from IIT Bombay, one from Columbia University and one from ISB Hyderabad) along with having cleared all 3 levels of CFA.

Ruchika has been recognized by APREA as one of the top 50 Women Leaders in Real Estate across Asia Pacific in 2020

A book Ruchika highly recommends

Am I being too subtle?: The adventures of a business maverick
by Sam Zell

Rupa Vora was the Group Director & CFO - IDFC Alternatives for more than a decade and earlier, CFO of the Indian operations of Antwerp Diamond Bank N.V. and KBC Bank N.V. She was also associated with Calyon Bank and Oman International Bank S.A.O.G.

Before joining the corporate world, she ran an independent practice as a Chartered Accountant for almost a decade.

An independent director on corporate boards, she is a fellow member of the Institute of Directors and a lifetime member of the Independent Director’s Data Bank of the Indian Institute of Corporate Affairs.

Rupa is a member of CII’s National Committee on Financial Reporting 2020-2021 to 2022-2023 and is also involved with The Art of Living.

A book Rupa highly recommends -

Thinking, Fast and Slow by Daniel Kahneman

Rupa Rajul Vora

Director & Member
of the Board
India Alternatives Investment
Advisors

Guiding

Sakshi Jaiswar

Financial Associate
Wealth Café Financial Services

Promising

"With over two years of experience at Wealth Café Financial Service Pvt Ltd, Sakshi has gained a deep understanding of the complexities of personal finance and developed a skill set that allows her to break down complicated concepts into easy-to-understand terms.

During her journey at Wealth Café, she has collaborated with a team of experts to create engaging and interactive content, including workshops, blogs, and reels. Her work has focused on financial concepts like portfolio management, financial planning, and investment strategies. Sakshi has also completed NISM VA, VB, and VIII, and is currently pursuing CFP certification to further my expertise. Her ultimate goal is to become a Registered Financial Advisor and empower individuals to achieve financial independence.

A book Sangeeta highly recommends

The Art of Possibility by Rosamund Stone Zander and Benjamin Zander

"Sandhya Upadhyay is a CFO at Aditya Birla Sun Life Pension Management Limited. She is a financial professional with 20 years of experience across industries including BFSI, Conglomerates, pharma and consulting. Sandhya completed her Chartered Accountant and Diploma- Information System Audit from The Institution of Chartered Accountants of India. Moreover, she holds her expertise in Financial Analysis & Planning, Regulatory Compliance and Risk Management.

Sandhya was also felicitated with an award for Exceptional Contributor for the year 2006 for successful leading of ERP implementation.

A book Sandhya highly recommends

Lean In by Sheryl Sandberg

Sandhya Upadhyay

Chief Finance Officer
Aditya Birla Sun Life Pension Management

Leading

Sangeeta Biby

Vice President
SBI CapVentures

Progressing

Sangeeta has 15+ years of experience in successfully handling all activities of private equity funds. Currently Sangeeta is heading the largest GoI MSME Fund of Funds with an AUM of Rs 10,000 Cr (approx. USD 1,250 Million) along with UK Government Fund of Funds for Rs 5,000 Cr (approx. USD 625 Million). Sangeeta has the complete responsibility of fund monitoring and ensuring the funds have complied with all conditions along with compliance of SEBI Regulations.

In addition she has expertise in fund accounting and administration along with carried interest and equalization premium workings. Throughout her career she has managed, trained, and motivated multicultural teams to deliver key business process requirements efficiently and under tight deadlines. She has complete understanding of international funds and Indian AIF and related master and feeder fund structures.

A book Sangeeta highly recommends
The Alchemist by Paulo Coelho

Seema Chaturvedi

Founder & Managing Partner
AWE Funds

Leading

Seema Chaturvedi is Founder & Managing Partner of AWE Funds and has a rich financial markets experience of over 25 years, in India and the US in both private and public sector development.

She has helped catalyze over $5 billion of economic value creation through investments and financial advisory to major public and private companies. As a serial entrepreneur, experienced investor, strategy advisor, investment banker, fund manager, thought leader, speaker and policy advocate, she has been recognized by several national and international organizations, including US Congress, Global Achievers Award, United Nations Women (India), Business Rankers Women Achievers Award, Influential Women in Tech, TiE Global, and more.

Her prior experiences include working with leading investment banking firms in India (JM Financial) and the US (Shearson Lehman, Amherst Partners).

She has served on for-profit and nonprofit boards in India and US, including first woman on TiE Global Board, US State Department funded Project AIRSWEEE, Great Lakes Manufacturing Council, USA, Marygrove College, International Business Council at Automation Alley, Economic Advisory Council (EAC) of Center for American Progress, Washington DC, and more.

As a thought leader she has served as Senior Advisor, UN Women India Country Representative on Sustainable Finance; elected Co-Lead, Climate & Gender 2X Collaborative; US State Department International Speakers Program; IFC Healthcare Conference; UK House of Commons, member of Indiaspora and more.

She holds a Master's Finance from Boston College; Bachelor's in Economics (Hons) Lady Shri Ram College; Certificate in Board Readiness, Harvard Business School.

A book Seema highly recommends
Principles by Ray Dalio

Shikha has an experience of almost 8 years in the industry. Currently she is working as Senior Product Manager with Axis Asset Management company and has earlier worked with Mirae Asset Mutual Fund and Motilal Oswal Financial Services.

Shikha completed her MBA in Business Economies from DAVV university, Indore and currently, she is pursuing CFA Level I

A book Shikha highly recommends
The One-Page Financial Plan by Carl Richards

Shikha Vageria
Senior Product Manager
Axis Asset Management Company

Promising

Hailing from a small village in Sindhudurg district of Maharashtra Shilpa started her career with SBI Funds Management Pvt. Ltd. in the operations division in the year 2005. Her five years stint with SBI Funds helped her move up the corporate ladder by two notches and with a myriad experience of the mutual funds operations.

Based on her consistent performance and domain expertise in mutual fund operations, she along with her team got the opportunity to migrate from SBI Funds Management and be part of the newly formed young and vibrant team of SBISG to build the fund accounting division from scratch.

Over the past decade,she has driven several critical functions within SBISG.

A book Shilpa highly recommends
Jonathan Livingston Seagull by Richard Bach

Shilpa Samant
Senior Manager
SBISG Global securities Services

Progressing

Shweta Laddha

Vice President and Head
Compliance & Secretarial
Multiples Alternate Asset Management

Progressing

Shweta is an MBA, Company Secretary and LLB. She has more than 13 years of diversified work experience across BFSI (investment banking, compliance, corporate secretarial, legal) and has worked with all financial sectoral regulators.

Presently she is working with Multiples Private Equity as Head – Compliance & Secretarial. At Multiples, apart from managing all regulatory/ non-regulatory compliances (including AIF, PIT and AML Regulations) of Multiples PE Funds and group entities, her role is to steer value creation for portfolio companies in the field of compliance and governance. She enjoys understanding different sets of regulations as applicable to her investee companies and helping the compliance and governance function over there to step up to the next level. In her previous stints, she has extensively worked with AIFs, financial sectoral regulators, set-up and led the compliance and secretarial division of fintech, developed policies, SOPs and charters for businesses and worked on complex transactions right from fundraising to corporate restructuring.

A book Shweta highly recommends
Jonathan Livingston Seagull by Richard Bach

Shweta's journey over 15 years in the financial services industry is filled with diverse experiences and wearing multiple hats throughout her career. Currently, Shweta is the Senior VP-Financial Planning and Business Excellence at IMMPL. Taking the mantle of digital transformation at IMMPL, she focuses on ensuring client engagement and personalization remain the fulcrum while technology acts as an enabler. In addition, she is responsible for driving numerous strategic business excellence initiatives and streamlining business operations.

Before joining IMMPL, Shweta trained and guided budding CFP professionals. Shweta is a Certified Financial Planner (CFP) and Certified Financial Transi onist (CEFT). She has also completed a course on Client-Centricity from ISB-Hyderabad. She is MBA-Finance from IPE, Hyderabad.

A book Shweta highly recommends
Mindset: The New Psychology of Success by Carol Dweck

Shweta Rai

Vice President- Business Excellence
International Money Matters

Progressing

Sonu Bhasin

Family Business Historian
Independent Director, Business Author
Founder and Editor-in-Chief
Families & Business

Guiding

"Sonu Bhasin is one of the early and senior women professionals in the industry. In her career of over 30 years, she set up and managed large businesses, and diverse teams, across financial and non-financial sectors in India and overseas.

Sonu led various businesses in senior leadership positions during her corporate career. She began as a TAS (Tata Administrative Service) Officer with the Tata Group and spent 13 years with the Group before becoming a Banker. As a Banker, she was a Director at ING Barings, President Axis Bank, Group President Yes Bank before going back to the Tatas as COO Tata Capital Limited. Sonu is an Independent Director on Boards of well-known and reputed domestic and multinational companies.

She now focuses on family businesses and is the Founder of FAB – Families And Business. She is a family business historian, business author and is the editor-in-chief of Families & Business magazine.

Sonu has a degree in B.Sc (Hons) Mathematics from St. Stephen's College, Delhi University and a MBA from Faculty of Management Studies, Delhi University.

"Dr. Sujata Seshadrinathan, holder of two patents in the IT products space, is one of the Founder Shareholders and the Director of IT & Process at Basiz Fund Service Private Limited Sujata's expertise spreads over finance, investments, accounting and technology covering, inter alia, blockchains, automated technology solutions and products for accounting applications in the fund industry, process engineering based on six sigma architecture from inception to implementation, and SSAE certifications. She was awarded the degree of Doctor of Business Administration with Dean's List Merit Scholarship for coursework, for her thesis on Determinants Of Adoption Of Blockchain Technology For Accounting Applications, by the S. P. Jain School of Global Management Singapore. She is also an Adjunct faculty for management courses teaching Entrepreneurship and Technology domains.

She is the recipient of Women Entrepreneur of the Year award for the SAARC (Bronze) at a ceremony held under the aegis of the Women's Chamber of Industry and Commerce, Sri Lanka, at the hands of the First Lady of Sri Lanka, Prof Maithree Wickremesinghe, at a function held on Colombo, Sri Lanka, in 2023.

A blog Sujata highly recommends -
www.seshspeaks.com

Sujata Seshadrinathan

Director- IT & Process
Basiz Fund Services

Leading

Swati Bhartia

Principal
Motilal Oswal Private Equity

Progressing

Swati is a Principal at Motilal Oswal Private Equity. She has more than 15 years of experience in managing PE investments and equity research. Before joining MOPE, she worked with Tata Capital Healthcare Fund (TCHF) for nine years. During her stint with TCHF, Swati was involved in end to end deal management and successfully deployed USD 100+ Mn. Prior to that, she worked with Oman India Joint Investment Fund (OIJIF), where she was involved in deal evaluation across diverse sectors. She started her career with Crisil as equity Research Analyst in 2005, covering European mid & large-cap Biotech companies.

Swati is a 37th All India rank-holder Chartered Accountant and a CFA charter-holder. She is a part of Bloomberg's Women Buy-side Network (India) and featured as Top 40 Alternate Investment Professionals in India by Equalifi (earlier AIWMI).

A book Swati highly recommends -
The Psychology of Money by Morgan Housel

Vidya is a Senior Fund Manager at ICICI Prudential Life Insurance and handles a fixed income portfolio in excess of USD 4 billion. She has consistently delivered market leading returns as compared to most fixed income portfolios in the market across the insurance and mutual fund industries. As recognition of her market leadership, the size of the funds under her management has seen rapid growth and she has also been consistently acknowledged as one of the most Astute Investors by leading financial publication 'The Asset Research Benchmark' over the past many years.

In addition to her role as a Senior Fund Manager, Vidya also oversees the Credit portfolio of the company. The research and analytical based investing philosophy institutionalized by her has ensured that the company has been able to successfully navigate multiple market crises and dislocations over the years without a single default or write down – a unique feat in the industry. Vidya is also an active participant in many industry forums.

Before joining ICICI Prudential Life Insurance, Vidya worked with J.P. Morgan as part of their Global Markets team. She is an engineer from NIT Surat and holds an MBA degree from XLRI Jamshedpur.

A book Vidya highly recommends -
Life without Limits by Nick Vujicic

Vidya Iyer

Head of Credit and Senior Fund Manager
ICICI Prudential Life Insurance

Leading

Vinutaa S

Vice President and Sector Head
ICRA

Progressing

Vinutaa is currently Vice President and Sector Head - Corporate Ratings at ICRA Limited, and also a member of ICRA's rating committee. She has handled credit rating assignments of several companies across varied sectors including auto and auto ancillaries, tourism and hospitality, pharma and healthcare, cement, industrial and consumer goods to name a few. She also co-authors ICRA's research reports in electric vehicles, auto ancillaries and hospitality. Vinutaa holds a PGDM in Financial Management from S P Jain Institute of Management, Mumbai, and a Bachelors in Computer Science and Engineering from Sri Venkateswara College of Engineering. She was a university rank holder in her undergraduate.

Aside from work, Vinutaa likes to mentor junior finance professionals and students, and works on initiatives centered on uniform primary/secondary education accessibility. She is also passionate about women empowerment and women-led small businesses. In her free time, Vinutaa enjoys traveling, reading non-fiction content, and learning about handloom textiles, art and music

A book Vinutaa highly recommends -
Musings on Market

equaliFi

Erstwhile aiwmi Association of International Wealth Management of India

Equalifi (erstwhile AIWMI) is a global membership network of financial services organizations & professionals. Equalifi is a professional development platform meant to offer its members, opportunities to earn professional designations; to participate in multidisciplinary knowledge initiatives, enable networking at conferences; and offer one single platform for interaction, cross-pollination of ideas and collaboration.

Equalifi provides the opportunity for finance practitioners and related professionals to connect and advance their focused area of practice. Equalifi aims to benefit the practitioner, their area of specialization, the clients they serve, and the industry at large.

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