

Ishaan Bhatia

8 Years 6 Months Overall Experience

Financial research and data strategy professional with 8+ years of experience leading cross-functional teams to deliver high-impact financial research, drive strategic projects and optimize data research operations. Demonstrable skills in data research operations, financial modeling, strategic project management and stakeholder management.

Industry

- Financial data and research

Functional Areas

- Finance
- Product Management
- Project Management
- Strategy
- Stakeholders Management
- Financial Modelling & Valuation

Education

Indian Institute of Management, Indore

Masters Of Business Administration

2025-26

Shaheed Bhagat Singh College, University of Delhi

Bachelor of Commerce (Hons)

2010-13

Certification

GenAI for Business Practitioners

Certification in GenAI for Business Practitioners issued S&P Global

2024

Digital Product Management - Modern Fundamentals

University of Virginia

2025

Agile Project Management,

Google certification

2025

Accomplishment

Deliver and Execute Award

Awarded ‘Deliver and Execute Award’ at S&P Global for my contribution towards a product development project for a proprietary data collection tool utilizing automation solutions and AI based technologies

Individual ACE Award

Awarded ‘Individual ACE Award’ at S&P Global for ideation of Lean initiatives in data collection tools.

Education

Indian Institute of Management, Indore

Masters Of Business Administration

2025-26

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Bachelor of Commerce (Hons)

2010-13

Experience

S&P Global Market Intelligence

8 Years 6 Months

Assistant Manager

Jan' 17 - Mar' 25

- Led a cross-location team delivering **financial research** and analysis on mergers and acquisitions and US bankruptcy transactions, comprising **financial models**, **valuations** and restructuring plans.
- Led a **product transformation** project for a proprietary tool, integrating automation and AI technologies; led a multidisciplinary **scrum team** using **Agile framework**. Drove adoption for over 65 + team members. Business impact through reduction in **TAT by ~30%** and reducing **errors by ~20%**.
- Negotiated and onboarded third-party financial data vendors by aligning operational synergies and finalized high-value contracts. Led to improved TAT and savings in **costs by 40%**.
- Conducted competitive intelligence and **benchmarking** to expand data product offerings and potential acquisitions for inorganic growth.
- Led **knowledge management** initiatives by implementing process mapping, drafting 10 + SOPs, research guidelines, best practice tools to improve efficiency. Drove usage for over 75 team members utilizing, reduced new hire training time by **20%**.

M2i Consulting

6 Months

Junior Analyst

Sep' 16 - Jan' 17

- Led an engagement for **code of conduct assessment** for **microfinance** institutions and non-banking financial companies (NBFCs). Conducted **credit risk assessment** used as a benchmark for lending financial institutions.
- Led an engagement for evaluation of **alternative energy** infrastructure for a nonprofit organization. Responsible for preparing detailed reports and leading presentations to key stakeholders.
- Covered sectoral KPIs and trends for **Renewable Energy** sector and presented to stakeholders.
- Delivered a **market assessment project** for the growth potential and strategic viability of a microfinance product for a leading Non-Banking Financial Company.