



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

Shaheed Bhagat Singh College, University of Delhi

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.