TrainingCentral

**Profile – Domain Expert** DE230 – Ms. Anagha Hunnurkar

**Qualifications**

CFA from ICFAI
ACWA
PGD in Forex and Treasury Management
DMS
LLB
B. Com.

**Organisations Worked for**

Technical Advisor, Rwanda National Investment Trust Ltd.
Unit Trust of Tanzania
Unit Trust of India
C3 Advisors Pvt. Ltd
Marketsecrets

**Base Location:**

Navi Mumbai, India

**#Years of Experience**:

30 (DoB – 1 Mar, 1959)

**Description of roles and responsibilities held over the years**

- Robust grounding and international experience as institution set-up team and development of MF products
  - Unit Trust of Tanzania
  - Rwanda National Investment Trust Ltd.
- Rich experience as Fund Manager for Balanced and Fixed Income funds & Treasury Head, Unit Trust of India
  - Played key role in implementation of Accounting Software developed for UTI MMMF
- Supported Corporate finance & Funds raising for C3 Advisors Pvt. Ltd, a corporate advisory services company.
- Advisory Board - Marketsecrets – a knowledge-based initiative.

**Key highlights of career**

- Fund Management / Treasury/ Investment Advisory
  - Fund Management (Equity and Debt Mutual Funds): India /Tanzania/ Rwanda (2000- 2019)
  - Product design and development of mutual fund products for Tanzanian markets (2005 – 2009) and for Rwanda (2015-19)
  - At Unit Trust of India, managed funds worth USD 1 billion - Rs. 5000 Crores under MIPs, encompassing a portfolio of 80% in government securities & debt market instruments, and 20% in equities. (1999 -2003)
  - Dealing in treasury bills/bonds in the secondary market and treasury management, including bidding for treasury bills/ bonds auctions. India /Tanzania (2000 – 2009)
- Setting up New Initiatives / Businesses
  - Developed the RNIT Iterambere Fund in 2016
  - More recently instrumental in advocating RNIT to be a licensed Investment Manager for pension schemes
  - Instrumental in preparing various inputs required for strategic direction of RNIT Ltd, designed several other products which are currently under consideration and overall actively involved in key decision making.
  - Steered the Product Team at UTT to develop REIT (Real Estate Investment Trust) encompassing an integrated turnkey project, right from construction of the building to the scheme's launch.(2007) as well as Jikimu Scheme 9 Retirement benefit scheme ) for retail market
  - Closely interacted with Bank of Tanzania and other banks to transact Reverse Repos – the first vertical repo to be traded in Tanzania (2005).
  - Bagging a tender for Unit Trust of Tanzania for a consultancy project of Ngorongoro Conservation Area Authority, aimed at the launch of a Corporate Bond.

- Marketing/ System Implementation
  - Played a major role in formulating the Finance and Fund Manuals at RNIT Ltd ( 2016-17) and Risk Management Manual for UTT.(2007-2008)
  - Liaised with Finance & Accounts for adopting NAV Accounting as per IFRS. (UTT - 2007-2009) (RNIT :2015-2019)
  - Played key role in the implementation of the Accounting Software developed for UTI MMMF ( 2002-3)
  - Headed Marketing Cell of UTI Western Zone and managed marketing operations across 17 branches with team of 56 Chief Representatives and an agent force of 30,000.(1996-99)
- Investment Banking and other initiatives
  - Resource person for modifying Rwanda laws and regulation w. r. t. to unit trust and also taxation policies, investment policy guidelines by the Central bank as regulator of banks, insurance and pension funds
  - Member of the technical team for the proposed Kigali International Financial Centre
  - Capital Interface and Financial advisory – deal sourcing esp in Real estate & SME
  - Associate at CIEL – Centre for Investment Education and learning
  - President India operations – Maina Foundation, USA (a non- profit) – working towards breast cancer awareness wherein 99.9 % of the funds go to actual grass root implementation

Organization : Rwanda National Investment Trust Ltd.
Designation : Technical Advisor
Period : Mar 2015 to 31 Oct 2020

Key Responsibilities and Achievements

Upto 31 Oct 2020, was under framework contract as Technical Advisor at the Rwanda National Investment Trust Ltd. Prior to that, was working on full time basis since March 2015 to Oct 2019. Responsibilities included

- Writing the business plan
- Involved in all the key functions like corporate strategy, investments, operations, marketing and fund accounting.
- Instrumental in advocating RNIT to be a licensed Investment Manager for pension schemes
- Prepared all bidding documents for investment management services for the Long term savings scheme – Ejo Heza. The tender has since been awarded to RNIT and RNIT is now actively rendering fund management services to Ejo Heza.
- Designed several other products which are currently under consideration and overall actively involved in key decision making.
- Guiding the management team and staff for workflow
- Preparing all requirements for applying for Investment management license for the company,
- Designing the first unit trust –RNIT Iterambere Fund and getting regulatory approvals,
- Drafting documentations like investment policies, fund manual, procedure manual and the like
- Analyzing the market, trends, opportunities, and research.
- Basic business logic for implementation of MIS.
- Key person in marketing strategy including institutional marketing, liaisoning with NGOs for savings groups, public awareness, and road shows.
- Worked closely with banks, MFIs, SACCOs, stockbrokers, MNOs, digital platforms (Mobicash, Save, Gwiza) for contracting them as collecting agents and training.
- Studied various laws on taxation, Trust and trustee law, law for CIS, Regulations on prospectus in connection with the unit trust and spearheaded the modifications required therein.
- In-house training and capacity building including training to Board members and Trustees.

- Developed an Education Series for enabling investors to understand the market dynamics and the offering have been posted on the RNIT website. Have also appeared on TV shows on the CNBC Africa Channel.
- Represented RNIT as a speaker on various forum on capital markets.

Organization : Marketsecret (Brzee Group)
Designation : Advisor
Period : April 2009 till Feb2015

Key Responsibilities and Achievements

- Set-up of a PMS and knowledge-based initiative

Organization : C3 Advisors Pvt. Ltd.
Designation : Consultant - Corporate finance & Funds raising
Period : Oct 2009 till Jan 2012

Corporate finance & Funds raising for C3 Advisors Pvt. Ltd, a reputed a corporate advisory services company, Mumbai

Key Responsibilities and Achievements

- Pivotal role in fund raising, risk analysis and financing for projects, across varied segments.
- Significant knowledge of the unlisted segment of the Capital Markets.
- Structured products to suit the needs of the lender, investors and the business for decisive deal-closure
- Deal Sourcing for Private Equity / Venture Funds (various totaling USD 500 million - Rs 2500 cr.)

Organization : Freelance Consultant
Designation : Freelance Consultant
Period : Oct 2009 till Jan 2012

- Worked as a consultant for Exim Advisory Services, Tanzania
- Worked on a short project with Malawi to study feasibility of setting up unit trust

Organization : Unit Trust of Tanzania, Tanzania
Designation : Technical Advisor (Investment Management), Member, Management Team.
Period : Mar 2005 – April 2009

Key Responsibilities and Achievements

- Led the product design and development of Jikimu Income Scheme launched in Nov'08.
- Worked closely with MFIs and Savings and Credit Co-Operative Societies (SACCOs).
- Steered the Product Team to develop REIT (Real Estate Investment Trust) encompassing an integrated turnkey project, right from construction of the building to the scheme's launch. Received recognition for the pioneering effort, which was not present in several developed markets.
- Played a major role in formulating the Risk Management Manual for UTT.
- Liaised with Finance & Accounts (Confirm) for adopting NAV Accounting as per IFRS.
- Closely interacted with Bank of Tanzania and other banks to transact Reverse Repos – the first vertical repo to be traded in Tanzania.
- Instrumental role in:
    - Preparing RFP for CISMS (Collective Investment Scheme Management System), software developed to manage Mutual Fund products.

- Designing and creating the marketing pitch for various unit trust products.
- Bagging a tender for UTT for a consultancy project of Ngorongoro Conservation Area Authority, aimed at the launch of a Corporate Bond.

- Drafted marketing plan and efficiently conducted public education programme across Tanzania as a platform for the launch of Umoja Fund.
- The IPO of the first unit scheme, Umoja Fund (a balanced open-ended fund), closed for sale on 29th July, 2005 and mobilized TZS 90.5 Billion ($ 90 M). This was highest ever in entire East Africa until then.

Organization : Unit Trust of India
Designation : Fund Manager for balanced and fixed income funds & Treasury Head
Period : Feb 1999 – Oct 2003

Key Responsibilities and Achievements

- Devising asset allocation strategy and managing a portfolio of listed equities (20%), long term debt and short-term instruments for 7 funds with cumulative AUM of Rs. 4900 crores.
- Active trading in G-Sec as well as equity markets at a time when most funds were largely buy-and-hold.
- Risk Evaluation of the portfolio and management of risk
- Evaluating the fund performance and reporting to the Asset Management Committee.
- Managed treasury worth Rs. 2500 Crores ($625 million) for all UTI schemes, inclusive of call placements and Govt. Securities trading.

Organization : Unit Trust of India
Designation : AVP, Western Zone Marketing
Period : Sep 1996 – Jan 1999

Key Responsibilities and Achievements

- Headed Marketing Cell of Western Zone, with major responsibilities including corporate communication, targetsetting and strategy planning.
- Marketed UTI products across 17 branches with team of 56 Chief Representatives and an agent force of 30,000.
- Played a major role in managing events for various conferences and club meets that were attended by over 200 people. This included arrangements for stay, felicitation and outstation events.
- Steered the Western Zone to top sales performance charts during this period, with sales figures being doubled.
- Organized training courses for agents and branches for marketing of UTI products.

Organization : Unit Trust of India
Designation : Operations
Period : 1986 –1996

Key Responsibilities and Achievements

- Has been working in operations, managing unit holders register and relevant reconciliations.
- Worked in the legal department and HR department as also Consumer Forum Cell.