

From: Bob Cavoto

Sent: Jun 06, 2025 14:37:11.000000000 UTC

Subject: Prashant Achyut, COO/CAO - Financial Services, Private Equity & Hedge Fund

To: atravinski@cityofmelrose.org <atravinski@cityofmelrose.org>

Hi Adam,

Below is Prashant Achyut's resume for your review (upon request we can attach a PDF version). As COO of a division of Credit Suisse overseas, Prashant successfully grew the company's global Equities business to the top spot in that market with almost \$2B in revenues. He drove new business growth, built and mentored teams, and optimized business operations as a member of the regional management team. On the heels of this successful tenure, Prashant co-founded an investment advisory firm where he leads the Research Product team and all the company's functional areas while also sourcing and closing company acquisitions. Revenue reached \$10M in the company's first three years, continuing his track record of devising and executing strategies to build successful businesses.

Prashant is exploring new opportunities at this time. Currently located in the New York City area, he is available to travel and open to relocation. If his experience and skill set are a match for any opportunities within your firm, please contact me or Prashant directly. **Please note, Prashant is part of our "Friends of the Firm Program," so there is no fee associated with his introduction.**

Thank You,

Bob Cavoto

Co-Chairperson & Chief Executive Officer

[646.873.6890](tel:646.873.6890) ext.7755

bcavoto@2020-4.com

www.2020-4.com



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PRASHANT ACHYUT

New York City Metro Area

(917) 779-0905 | www.linkedin.com/in/prashant-achyut | prashant@pachyut.com

OPERATING PARTNER/CHIEF OPERATING OFFICER/INVESTOR

Business Development, Operations & Investment/Strategy

Immersive and detail-driven leader with a proven ability to bridge client-facing strategy and operational excellence. With experience spanning private equity, capital markets, investment banking, and public markets investing, lead from the trenches to tackle challenges, streamline processes, and deliver impactful results. Adept at aligning strategic vision with operational rigor, leverage a foundation in advanced investment analysis to distill

the big picture into actionable strategies—enabling early trend identification, business scaling, complex acquisitions, talent development, and cross-functional collaboration to drive sustainable growth and profitability.

Core Competencies

- | | | |
|---------------------------------|------------------------|-----------------------------|
| • PE/PD/Public Market investing | • Strategic Planning | • PE Deal Origination |
| • Product Development | • M&A and Partnerships | • Private Equity and Debt |
| • Investor Relations | • Client Management | • Leadership/Team Building |
| • P&L Management | • Business Development | • Prompt Engineering/Gen AI |

Private Equity Firm, New York, NY

2024 to Present

Entrepreneur-led private equity/Private Debt firm investing in North American businesses with \$2–20M EBITDA.

Chief Corporate Development Officer

Embarked on remake to understand portfolio companies, operations and growth prospects. Achieved this by Co-authoring annual report with President, revamping website and attending board meetings. **Selected accomplishments as follows:**

- Identified growth as a priority for port cos and developed growth consulting internally. Developed growth plan for firm – involving 3-year vision and translated this into integrated operational plan with detailed revenue forecast, hiring roadmap and proposal to reduce delivery costs by offshoring. Led efforts with Technology team help portfolio CEOs visualize business and identify levers of growth.
- Firm was behind on deal targets. Focused on identifying new deal sources – led the pre-IOI diligence on companies, sourced ~6 new deals, negotiated LOIs, and developed plan to institutionalize inbound deal pipeline.
- Initiated an offshore center of excellence strategy, including securing an LOI for a strategic financial services acquisition in a low-cost location. Sat on the board of BERG (new portfolio company acquired in 2024).

Institutional Investment Advisory Firm, Hong Kong/NY

2018 to 2023

Built and scaled from scratch an Independent institutional investment advisory firm with 30+ global employees, offering full-scale research services across international markets.

Chief Operating Officer

Led all key functional areas, including Compliance, Risk, Technology, Marketing, HR, Product Development and Research Product teams, with four (4) direct reports. **Selected accomplishments as follows:**

Product and Platform Development:

- Led research on Energy & Net Zero Transition and publish coverage of oil and gas and Chinese internet companies.
- Drove Aletheia Connect – our video conference platform to bring ideas to investors.
- Signed Marquee analysts onto platform, acquired two independent licensed entities in HK to reduce GTM time by starting with 200 onboarded clients immediately. Sourced, negotiated and closed three (3) acquisitions including CRM provider.
- Negotiated strategic products in India, China, and Thailand and helped grow product pipeline by 66% and stock coverage by 2x during COVID. These alliances led to 50% + increase in our scale of coverage.

Sales/Marketing

- Grew revenue to \$10MM in three (3) years from inception and achieved the #1 position per *Institutional Investor* in 2022 for same-size companies. Registered 200 clients at inception.
- Key account manager for investors including Treeline, Voya, BCI, OMERS, Oppenheimer, Torq, Kora, Capital, Nuveen, Point 72, Geosphere, Ariel Asset Management, GIC, and British Columbia Investment Management.
- Developed sales technology and CRM to drive 70% of sales leads and 25% of new sales.

Rapid Operational Scaling

- Reduced delivery to market time by 12-18 months by making strategic acquisitions immediately on start.
- Shrunk operating costs by 10% by identifying synergies across acquired companies.

Technology Development and Management

- Redesigned strategy resulting in expanded sales funnel 100%+ globally.
- Spearheaded technology project to track leads and create sales dashboards.
- Led our first Regulatory Audit by the SFC.

Credit Suisse, Hong Kong and Mumbai

1997 to 2018

Premier bulge bracket investment bank that was top three in key businesses including Equities. In Asia was a top ranked research team as well as a top three equities player with \$2B+ revenues in 2015.

Chief Operating Officer: Asia Pacific Equities (APAC) (2011-2017) & Global Markets (2017-2018)

With 8 direct reports and member of APAC Management committee, devised and executed strategy, managed expenses, operations, talent, compensation and new business initiatives. Drove regulatory compliance and helped mitigate operational risk. **Selected accomplishments as follows:**

Business Development and Sales/Marketing:

- Grew APAC revenues and performance from \$1B to \$2B within five (5) years - most profitable Equities business.
- Created a new business pipeline. Executed management committee expansion plans to target revenues 30%+ of revenue base including onshore China equities, derivatives insurance term annuities, and prime services.
- Drove the design and execution of a plan to identify gaps and then formulate business plans to close them to double revenue to \$2B in 12 quarters.

Operations:

- Increased Profitability: Improved margins from 0% to 45% and increased profitability by restructuring Australia/Japan (slated to be shut down) and consolidating Prime Risk and Derivatives.
- Talent Management and Compensation: Achieved 90% alignment of compensation and performance metrics by mapping talent and succession plan and driving combination of siloed databases.
- Organizational Efficiency: Cut direct controllable expenses by 15% including headcount reduction, consolidation of functional roles across businesses, and rationalization of variable trading costs. Achieved 10% overall cost reduction by facilitating outsourcing to India. Reduced Japan and Australia costs by 15% while doubling revenues.
- Role Optimization: Combined equities/fixed divisions income by rationalizing business and reducing costs 15%.
- Led 13-member team of COOs across businesses/regions.
- APAC Management, Global Operating, Chair of APAC Global Markets Operational Risk Committees.

Managing Director Co-Head of Global Oil and Gas Research and Head of APAC Oil & Gas Team (2003-2010)

Investment Analysis & Strategy: Consistently top ranked team – top 3 in Asia, top 3 globally. Managed 30+ global reports and named a top-ranked team.

Vice President/Associate (1997-2003)

Grew revenues and expanded client recognition to become consistent top 3-5 internal and external firm-wide Analyst.

Education & Professional Development

Master of Business Administration, Indian Institute of Management, Calcutta, India, 1997.

Bachelor of Commerce, Sydenham College, Mumbai University, Mumbai, India, 1995.

Continuing Education: Leading Sustainable Corporations Program, Oxford Said School of Business.

Building A Data Science Team, Johns Hopkins University.

Software Proficiencies: MS Office Suite, Bloomberg, Factset, Salesforce, Generative AI/LLM.

Corporate/Board Membership: CS Thailand, CS Indonesia + Commissioner, Berg Industries.

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