



Engagement Snapshot

- Valuation model / report for a US-based M&A Advisory Firm
- Pitch books for an M&A consulting firm based in Stockholm
- Financial modeling for a US-based Mutual Fund House
- Asset allocation plan for a UK-based Wealth Management Firm
- Equity research of a portfolio of 50 stocks for a US-based Brokerage House
- Equity Analysis for a Connecticut-based Mutual Fund
- Investment Advisory Report for a leading US Fund
- Fund Research for a Swiss-based Hedge Fund
- Fundamental Analysis and Market Research Study for a premier Management Consulting Firm in Boston
- Debt portfolio evaluation for one of the largest clearing houses in the UK

Client Testimonials

Brickwork provided me with a fantastic personal assistant who assisted me primarily in creating financial plans for high net-worth clientele and business owners. I always experienced a professional "can do" attitude and enthusiasm to bring every project to a higher level. With BW's help, my firm tripled its assets under management in one year

- **Jacob Cooper, CEO, Total Wealth Management**

I enjoyed working with Brickworks over the past year. Brickwork's professional staff and responsiveness exceeded my expectations. Brickwork's comprehensive analysis of my company's financial status gave me great insight into my business and the essential data I needed to make management decisions. Thank you!

- **Nick Kovak, President and CEO, TargetCast, Inc**

All the work was of a very high standard, timely and on what was asked no real areas for improvement. I'd certainly use your services again and would recommend you to my colleagues for research efforts.

- **Marketing Head of a Fortune 500 bank in US**

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Investment Research

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About **Brickwork India**

Brickwork India was founded by Vivek Kulkarni in 2004 to offer integrated services – virtual assistance, research assistance and IT services – all under one roof. Vivek pioneered the concept of Remote Executive Assistant (REA) in early 2004 to provide business assistance at an affordable price to SMEs and professionals. This concept found instant worldwide recognition including the New York Times best seller ‘The World is Flat’ by Thomas Friedman; ‘The 4 Hour Workweek’ by Tim Ferriss; recently in Knowledge@Wharton; as well as several international magazines and TV shows.

About the Founder – Vivek Kulkarni

Vivek Kulkarni, a Wharton MBA graduate, has 30 years of experience in managing different verticals of business and government departments. In early 2008, Vivek started “**Brickwork Ratings**”, a **credit rating agency** recognized by the Indian regulator “Securities & Exchange Board of India” (SEBI), to help investors make informed investment decision. It is the 5th SEBI licensed Credit Rating Agency in India and has made a name for itself within a year of operations. Vivek also served as Director and Chairman of the Technology Committee on the Board of the Bombay Stock Exchange, the oldest stock exchange in India.

About Investment Research Support Services

Brickwork India Investment Research team offers an array of services for firms on the “Sell Side” (i.e. Investment Banks, Independent Research firms, Brokerage Houses and M&A Advisory firms) and firms on the “Buy Side” (i.e. Hedge Funds, Mutual Funds, Private Equity firms and Asset Managers). Brickwork analysts are experienced MBAs, CPAs, and CFAs with advanced degrees in finance and economics.

Support Services **Investment Research**

Investment Banks & Brokerage Firms

- Equity Research & Analysis
- Credit Research & Analysis
- Stock Screening

VC/Private Equity & Hedge Funds

- M&A advisory
- Due Diligence
- Investment Memorandum

Banking & Financial Services, AMCs

- Credit Rating & Analysis
- Trend Analysis of Financial Instruments
- Financial Planning

Consulting Firms & Entrepreneurs

- Research on Financial Markets
- Feasibility Study
- Business Plans and Financial Model

Our services also include:

- Company Profiling & Analysis
- Customized Industry Research and Analysis
- Back Office Operations
- Bespoke Research Services

Brickwork Virtual **Research Center**

- Customized and on-demand research reports
- Access to Knowledge Infrastructure
- Client-specific dedicated teams
- High cost savings
- Timely turnaround & delivery schedules
- Client-specific process customisation
- Account manager: one-point contact
- Stringent security and confidentiality

Brickwork **Edge**

Databases & Subscriptions

Customized Client Solutions

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Talent Pool / Specialized Teams

- Business Research
- Investment Research
- Healthcare Research
- Legal Research
- Procurement Consulting