

# ALPESH PATEL OBE

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## BUSINESS VOICE • GOVERNMENT ADVISOR • ENTREPRENEUR/INVESTOR

It's been an honour to represent my country since 1999; **PM** appointed me to advise on closer UK/India ties. Then **Department for International Trade** made me their Dealmaker since 2004 – to bring outstanding tech companies to the UK, which solve the world's biggest problems and create jobs and wealth here. ([www.theeinsteinchallenge.com](http://www.theeinsteinchallenge.com)). Trade underpins liberty and uplifting people.

**Oxford Fellow in Business & Industry** back in 2001, (invited to the post by Margaret Thatcher's former economic Special Advisor). Won a competition in **FT** using investment algos to forecast UK company performance to benefit ordinary people not just fund managers.

**Financial Times author**, left being **Barrister** to pursue investing for social mobility. I also "give back" through my **financial literacy education company** and establishing a mentoring entrepreneurs company – part of the world's largest entrepreneur mentoring organisation. As a founder of a hedge fund/private equity firm (the easiest hard money to make) - our focus is on sustainability and social impact, not self-enrichment.

The 'penny dropped' when I realised I could **use my profile, Barrister's training, and TV presenter skills to raise funds – for widows, orphans, under-fed school-children, victims of slavery** – do something more fulfilling than earn a living.

Before all that, worked in **US Congress** for Eliot Engel on anti-terrorism and nuclear proliferation. Degrees in Law and Philosophy, Politics and Economics (Oxon). 18 FT, Macmillan published books on global markets and online trading.

As my **BBC paper review** for 10+ years to 300m shows – direct to the point analysis: [www.alpeshpatel.com/tv](http://www.alpeshpatel.com/tv)

TV presenter with my own show on Bloomberg formerly after Global Head of TV saw me on CNN, then Sky gave me tech/politics show and CNBC asked me to co-host; and 5 years columnist for Financial Times. Born & raised in Leeds (no silver spoon). Co-Chair Loomba Trust which supports widows and orphans. Speak globally to corporates on tech, UK, investing like the best in the world.

OBE in 2020 for services to the Economy and International Trade.

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## BUSINESS & ENTREPRENEURSHIP

- **PRAEFINIUM PARTNERS, FOUNDER PRINCIPAL:** Chairman, CEO of global venture capital / private equity asset management firm.
  - **HM GOVERNMENT DEPARTMENT FOR INTERNATIONAL TRADE, DEALMAKER**
  - Sourcing technology and entrepreneurs from India/China, SE Asia, to solve the world's biggest problems and do deals to HQ them in the UK.
    - Developed vision, implemented strategy to secure, recruit, and retain tech-rich start-up investments into the UK and thereafter global exports by them through shaping deals with investors and corporations worldwide.
    - Most senior member of a ten-strong team that delivered £1BN of investment to the UK since 2005.
    - Responsible for developing key relationships for with ministers, global governments, trade bodies, senior civil servants and blue chip investors, to position the organisation as a voice of entrepreneurs on foremost economic, political issues to maximise its effectiveness, through technical knowledge of policy and building strong trusted relationships to manage strategic risks; receiving several awards for the work.
  - **CHATHAM HOUSE, INVESTMENT COMMITTEE:** Advising on the allocation of funds for Chatham House, including investment strategy; having helped establish Chatham House Prize present by HM Queen.
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## GOVERNMENT ADVISORY & ENTREPRENEURSHIP

- **NUMBER 10 ENTREPRENEURIAL ADVISORY GROUP MEMBER:** Hand-selected by PM's office; delivered instrumental advice and strategy to attract and retain overseas entrepreneurs, IP assets and investments.

- **UK INDIA BUSINESS ANGELS NETWORK, CHAIRMAN:** Achieved agreement from the Prime Minister to launch a UK India Business Angel initiative, which partners Indian and UK investors with British companies to promote UK inward investment by Indian companies.
- **UK INDIA BUSINESS COUNCIL FOUNDING DIRECTOR:** A UK-India government body, established to promote bi-lateral trade and growth. Member of Remuneration Committee. Board responsibilities include oversight of strategy, lobbying initiatives, governance and finances. Membership includes FTSE 100 companies.
- **THE INDUS ENTREPRENEURS (TIE), UK CHAPTER CO-FOUNDER:** Board Member of a global entrepreneur mentoring organisation with 57 chapters and 13,000 members across 14 countries. Responsible for strategy to recruit and retain FTSE 100, Dow 30, global business members including HSBC, Microsoft by engaging them with valuable programmes and building pride in the organisation.

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## PROFESSIONAL EXPERIENCE

### DEPT FOR INTL TRADE, UK GOVERNMENT: DEALMAKER 2005 - PRESENT

Retained by UK Trade and Investment as part of an expert, senior team of Dealmakers. Contributes significant value to the UK economy, winning recognition within the Department; sourced and introduced early stage technology, IP and entrepreneurial talent from India, China and SE Asia, and also from US, EU, for UK HQs (special focus on women entrepreneurs). Secured financing from major venture capital, private equity and angel investment groups to evolve and transform start-up businesses to multi-million-pound entities.

- Contributed £1BN of inward investment / wealth creation into the UK as the longest serving and most senior member of a ten-person team, by driving engagement with business, converting leads into investment through deal making.
- Secured more than 80 high-growth businesses with a 90% survival rate; built exceptional relationships with global governments, ministers, trade bodies, diplomats, civil servants and entrepreneurs to achieve success.

### PRAEFINIUM PARTNERS: CHAIRMAN | FOUNDING PRINCIPAL 2004 - PRESENT

Launched fund management entity from initial acquisition; created business processes, infrastructure and growth strategy, with full compliance and regulatory authorisation in the UK, Luxemburg, Cyprus and Singapore. Developed the business to secure assets of €100M, with offices in UK, Singapore, Hungary and Germany. Help team set and achieve goals through mentoring and training.

### ALPESH PATEL VENTURES LTD | TRADERMIND LTD: FOUNDER 1997 - PRESENT

A high-profile past and present client list in 73 countries, including: American Express, Goldman Sachs, Lloyds Bank, Financial Times, Bloomberg, Barclays, Merrill Lynch HSBC, Charles Schwab, LIFFE, ICICI Bank, and E-Trade. Created a trustworthy personal brand as a global authority on fintech, investing, wealth management, entrepreneurship and business, as well as democratising investment by providing exceptional free education to create a society of global world-class investors.

- **ENTREPRENEURSHIP, BUSINESS AND GOVERNMENT ADVISOR:**
  - ICICI Bank, Investment Advisory Committee to Private Banking Division: Advised on global economy and best products & funds for a global high net worth market for India's largest bank. (2006-2010)
  - Member of the UK India Roundtable; advised Prime Ministers of both countries on building closer strategic ties, with initiatives becoming Government policy. (1999-2004)
- **MEDIA AND TELEVISION:**
  - Financial Times columnist, Bloomberg TV, CNBC Co-host: 200 columns published in the FT on global investing; winning FT award for most accurate FTSE predictor. Co-host Bloomberg TV on global business issues.
  - Authored a book that achieved #2 spot on Amazon, just behind Harry Potter.
  - Developed the lucrative financial section of Asian Voice as Consultant Editor; a leading weekly publication for UK Asian business. Created, editor of online trading sub-magazine within Shares magazine.
- **ACADEMIC ADVISORY:** Consults to university leadership / Boards and provides academic expertise to students.
  - **King's College, London**, Principal's Advisory Board Member 2008-
  - **Chatham House (Royal Institute of International Affairs)**, Member of Council 2003-9
  - **University of Luton**, Governor and Member of the Strategic Planning & Finance Committee, 2004 – 2007
  - **University of Reading**, Board of Advisors, Centre for Entrepreneurship, 2002 – 2004
  - **Oxford Business School Venture Fund, Member of the Executive Committee**, 2004
  - **Associateship of Kings College (AKC)**

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## EDUCATION AND PROFESSIONAL DEVELOPMENT

**Visiting Fellow, Business and Industry**, Corpus Christi College, Oxford University, 2001 – 2002

**MA, Philosophy, Politics & Economics**, St. Anne's College, Oxford University, 1995; *Bursary internship to US Congress*

**Called to Bar of England & Wales** from Honourable Society of Lincoln's Inn (1993)

**LLB (Hons) & Associateship**, Kings College, London University, 1992

# APPENDIX

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## AWARDS AND NOMINATIONS

- NRI Award for Excellence, NRI Foundation, presented by the Finance Minister of India
- Asian International Who's Who Award for Leadership in UK-India Business Relations
- Proshare Investment Personality of the Year: short-listed
- Media Award, Guild of British Asians: Nominee
- Asian Achievers Awards (Media Award): Winner
- 'Trading Online' voted top 10 business books of by Amazon UK, Independent Newspaper

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## PUBLICATIONS

Author of 18 investment books published by Financial Times/MacMillan; translated into Russian, German, French, Thai, Korean, Chinese

- 7 Simple Strategies of Highly Effective Traders (Harriman)
- Our Turn! The Ultimate Start-Up Guide for Female Entrepreneurs (Foreword by Lord Dennis Stevenson)
- Global Financial Markets Revolution: The Future of Capital Markets (MacMillan)
- Investing Unplugged (MacMillan)
- The Diary of an Internet Trader (FT)
- The Mind of a Trader (FT): Lessons in trading strategy from the world's leading traders
- Outsourcing Success: The Management Imperative (MacMillan/Tata McGraw Hill)
- Trading Online (FT) – reached no.2 on Amazon UK charts
- Net-trading: Strategies from the Frontiers of Electronic Day Trading (FT)
- The Internet Trading Course (FT)
- The Online Traders Cookbook (Wiley)
- The Pocket Guide to Trading Online (FT)
- Alpesh Patel on Stock Futures (Harriman)
- The Internet Trading Coursebook (FT)
- SpreadBetting: What Winners Do (Harriman)
- Your Questions Answered on Money, Investing, Financial Planning

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## SELECTED KEYNOTE SPEECHES AND PRESENTATIONS

- Investing in the UK – Qatar, Malaysia, Singapore, Hong Kong, South Korea, Shanghai, US, India 2005-2020
- Global Entrepreneurs & How They Build Their Businesses, Kolkotta
- How Global Entrepreneurs Go Global From the UK, Singapore, Kuala Lumpur, Bangalore
- Indo-British All Party Parliamentary Group, Panelist, UK,
- Accompanied Minister, Department of Energy and Climate Change, Delhi, Lucknow, Punjab,
- Department for International Development, UK Govt. (DFID), Panel Speech, London,
- Banque Privee Edmond De Rothschild Europe, Shaping the Future, Speech, Luxembourg,
- UK Trade & Investment, India Business Day Conference, Host,
- Panel participation, Belfast part of G8 event on inward investment, London,
- House of Lords, to IT Ministry of Govt of Andhra Pradesh,
- Imperial College, Business and Faith,
- Imperial College, Breakfast speech with Jim O'Neill and Sir Paul Judge, Host,
- Barclays Bank, Hindu Society Speech,
- Raising Capital, Delhi for TIE,
- Establishing businesses in the UK for UKTI/FCO, Kuala Lumpur & Singapore,
- Keynote, Fund management and software innovation, Paris,
- Keynote, Smart Investor Conference, Hong Kong, and Singapore
- Keynote, KPMG, UK India Potential to UK Indian VIP Community,
- Keynote, UK-India Potential with Stephen Timms MP, Houses of Parliament,
- Speech, All Party Parliamentary Small Business Group, UK Parliament,
- Speech, Investing Globally through the UK in Budapest to Business School,
- Keynote, American-European Investment Bankers Association Real Estate Conference, Mumbai,
- Launch Host, Finance Business Insurance Magazine, Houses of Parliament,
- Talk, All Party Small Business Group, Houses of Parliament,
- Chairman, presentation session on entrepreneurship & UK-India Opportunities, Oxford Business School,

**SELECTED KEYNOTE SPEECHES AND PRESENTATIONS CONTINUED ...**

- 'Business Success', to Investment Bankers in London: JP Morgan, Deutsche Bank, Merrill Lynch, Goldman Sachs,
- 'Market Outlook and Asian Business', to Birmingham Businessmen, PwC,
- 'Women and Business', Glasgow Chamber of Commerce,
- UKTI, Consultation Presentation on Govt White Paper on Globalisation, Trade and Investment,
- 'Starting in business', Senior Executives Programme, London Business School,
- University of International Business, Beijing: 'You didn't know the UK leads Europe in IT?',
- Chinese Ministry of Foreign Trade, UK representative in Beijing at Asia-Europe New Economy and Trade Co-operation Symposium to chair sessions and speak on strategies to improve EU-ASEAN-China trade,
- UK Foreign & Commonwealth Office and the Malaysian Foreign Office; UK representative at the Asia-Europe Young Leaders Symposium to recommend strategies for closer EU-Asia ties,
- Indian High Commission, 'The UK IT advantage and dangers of Indian IT complacency', Nehru Centre London,
- 'Improving investment bank trader selection', Centre for the Study of Financial Innovation,

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### **MEDIA COVERAGE**

- Newspaper Review, BBC1 and BBC World, fortnightly; audience of 275 million, 2010 - present
- Newsnight with Jeremy Paxman; Aid to India, 2012, and Tata Nano,
- BBC Radio 4 Today Programme, Business contributor 2010-present
- The Money Programme, BBC; Facebook IPO, 2012, corrected calling post-IPO price drop
- Weekly Columnist, Financial Times; 'Diary of an Internet Trader', published 200 columns in FT,
- Co-host, CNBC Europe,
- India Today, Columnist on UK India business issues,
- Consultant Editor and Columnist, Financial Voice, part of Asian Voice Newspaper, 2005 – Present
- Investment Columnist, MSN,
- Contributor: CNN, Sky Business News, CNBC (UK & US), Channel 4, BBC and US radio shows
- Bloomberg Television, 'CEO in the Hot Seat' and contributor 'Money Makers',
- Best performing stock selector among all covered on Bloomberg Television,
- Best performer, Financial Times predicting the FTSE competition,
- Weekly guest column for Merrill Lynch HSBC on best run businesses,

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### **VOLUNTARY POSITIONS**

- Deputy Chairman, Millennium Gates commemorating the service of Commonwealth soldiers in the two World Wars (2015-present) and committee member (2010-2015)
  - Women Empowered, Champion, 2012- Present
  - Akshaya Patra Host Fundraiser; raised >£30k,
  - Entrepreneurship Advisory Committee member, King's College London,
  - Principal's Circle Donor: King's College, London University
  - Oxford University Centre for Hindu Studies, Advisory Board, 2011- Present
  - Televised telethon for Akshaya Patra, Host; India school children feeding Programme,
  - Commonwealth Memorial Gates (Constitution Hill), Council Member
  - Co-host, dinner for HRH Duke of Edinburgh, Royal Society for Encouragement of Arts,
  - TiE, mentor to young entrepreneurs as part of TiE mentoring programme, 1999 – Present
  - Rowathon, Barclays Bank for RowForFreedom
  - City Hindu Network, Advisory Board
  - Barclays sponsorship, keynote speaker for British Asian Trust; funded book launch for Baroness Flather
  - Northwick Park Hospital, Golden Hearts Member; auction and charity dinner host with Attorney General,
  - Trustee, UnLtd (India); funding social entrepreneurship in India including charity auctions
  - Co-Chairman with Lord Bilimoria, Board of Advisors, Loomba Trust, major donor,
  - Pratham, children's literacy charity, major donor
  - St Gemma's Hospice, donor
  - Trustee GEN, India supporting healthcare in remote villages around Delhi,
  - United Nations Association Member; assisted corporate development to fund UNA to service
  - Fellow, Royal Society of Arts
  - Council Member, Royal Institute of International Affairs, Chatham House,
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