

Devesh Joshi

Forward Deployed Engineer, Applied AI in Financial Operations

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SUMMARY

Forward deployed engineer. Sits with the customer, works out what the system actually needs to do, and drives it until it ships. Currently embedded in two funds at once: a \$200M private credit fund that runs with no analysts, just its Managing Partner and AI agents, and an early-stage venture fund. Finance background as well as technical, so the same person can talk to the investment principal and to the engineers.

EXPERIENCE

Forward Deployed Engineer

January 2025 to Present

Vantedge AI (Y Combinator W22), AI infrastructure for investment funds | Mumbai

Own the client-facing half of a deployment: discovery, the project logic, coordination across the delivery team, and the daily relationship. Deployed into two live funds at the same time.

- **\$200M private credit fund with no analyst team, run by its Managing Partner plus AI agents.** Main point of contact on a standing daily call with him. He builds his own tools and compared us against the best AI products throughout. Drove the project logic and coordinated delivery. He **signed before his own fund had closed**, used the product every day, and became our biggest source of referrals.
- Designed a **maker-checker system** for work where accuracy matters: one model does the job, a second model checks it, Python handles all the arithmetic, and every figure links back to the exact spot on the scanned page it came from. The client could trace any answer to its source document. **100% accuracy on benchmark testing.**
- Set the logic for a **multi-stage document extraction pipeline**: read the scanned files, index them, then pull out structured numbers, so financial statements in wildly different formats come out standardised. Paired it with an engine that fills any Excel template from a data room of hundreds of files.
- **Won back a CRM purchase that was already in motion.** Instead of arguing the client out of it, specified and shipped an LP CRM to their own spec: a data room per LP fed from their existing SharePoint, email and meeting logging, calendar sync, and warm connections surfaced automatically. Handled their worry about being locked in the same way, by shipping one-click export of every deal and attachment.
- Worked inside the fund's confidentiality rules. Investor performance data stayed on their own systems, only deal data covered by an NDA was allowed in our cloud, and the numbers had to reconcile against their institutional administrator.
- **Early-stage venture fund (about \$30M AUM):** automated IC memos, cutting preparation from about 6 analyst-days a week to 1. Automated revenue and NAV reporting, taking reconciliation from a full day to about an hour. Built the founder scoring framework and the data pipelines for priced rounds and SAFEs.

Product Manager

January 2024 to January 2025

Digixpressions Media | Navi Mumbai

- **Led a team of six** building a research product that gave retail investors access to broker and equity research. Owned scope, spec and delivery across three modules.
- Shipped the stock research module, including vendor negotiation, buying the data and database design, plus a module that standardised analyst reports and **scored how accurate each analyst turned out to be**. Also delivered an AI-powered market news module.

Data Research Analyst (MDP Associate)

March 2023 to January 2024

Morningstar | Navi Mumbai

- Built the extraction **from scratch**: a Python scraper plus an **LLM-based parser** to pull dilutive-securities data out of filings across US, Canadian and Australian standards. Cut processing time by **over 15%**.
- Handled **200+ financial statements a month**, held **98.5% data quality** for three months running, and changed the team's method to reduce errors.

SKILLS

Applied AI: LLM orchestration and prompt design, maker-checker verification systems, multi-stage document extraction, OCR pipelines, semantic search and indexing, MCP-based agent tooling, benchmarking output where accuracy matters.

Technical: Python (automation, scraping, parsing, calculators), SQL, pandas, Advanced Excel, Git, structured data extraction, workflow design.

Client-facing: Discovery, pulling requirements out of non-technical operators, setting project logic, writing specs, running a daily build-and-feedback cadence, working directly with GPs and Managing Partners.

Domain: Private credit, venture capital, fund operations, NAV and fund reporting, financial statement analysis, confidential data handling and residency rules.

EDUCATION AND CERTIFICATIONS

B.Com, Accounting and Finance, University of Mumbai (Ramseth Thakur Public College), May 2021, CGPA 8.03/10 | NISM Series V-A | Python and Statistics for Financial Analysis (HKUST) | Lean Six Sigma Foundations