



Rounak Verma *MBA (Finance)*

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🌐 [linkedin.com/in/rounakverma07](https://www.linkedin.com/in/rounakverma07) 📅 6th, November 2001

SUMMARY

MBA Finance candidate with hands-on experience in financial data analysis, client documentation, and process handling. Skilled in working with structured data, verifying information, and preparing reports using MS Excel. Strong understanding of financial transactions, data accuracy, and risk awareness. Detail-oriented with the ability to identify discrepancies, follow structured processes, and work effectively in team-based environments.

SKILLS

Technical Skills

Microsoft Excel, Power BI (Basic), PowerPoint, Data Analysis, Financial Reporting

Core Skills

Data Validation, Financial Documentation, Research, Data Interpretation, Client Coordination

Soft Skills

Communication, Problem Solving, Attention to Detail, Team Collaboration, Time Management

INTERNSHIP

AAS Investments and Distribution Pvt. Ltd

Aug 2025 – Nov 2025 | Kolkata, West Bengal

Finance Intern

- Verified and analyzed financial records of 50+ clients, ensuring data accuracy and identifying discrepancies before processing.
- Supported client onboarding and documentation processes, ensuring completeness and correctness of financial information.
- Prepared and maintained structured reports using Excel, improving data organization and accessibility.
- Coordinated with clients to collect and validate required information, ensuring smooth process flow.
- Assisted in reviewing client financial details and transaction records, building understanding of financial data handling.
- Followed defined processes and guidelines while managing sensitive financial data.

EDUCATION

PGPFM + MBA (Finance)

Bengal Institute Of Business Studies, Vidyasagar University

Aug 2024 – Jun 2026 | Kolkata, India

Bachelor of Commerce (B.Com)

Sikkim Professional University

Jul 2021 – Jul 2024 | Gangtok, India

XII - ISC

Indira Gandhi Memorial School

Apr 2019 – Mar 2020 | Kolkata, India

X - ICSE

Indira Gandhi Memorial School

Apr 2017 – Mar 2018 | Kolkata, India

CERTIFICATIONS

- NISM VA - Mutual Fund Distributor
- NISM XXIA - Portfolio Management Services (PMS)
- MCCP - MCX Certified Commodity Professional
- SAP Finance & Controlling (FI-CO)

PROJECTS

Summer Internship Project (SIP) : Analyzed Tax Planning vs Tax Evasion, examining ethical boundaries and regulatory responsibilities of CA firm's.

Ultimate Startup Plan (USP) : Developed a startup model to market products by specially abled individuals.

Industry Visit - DCB Bank : Gained exposure to retail banking operations and branch-level processes.

ACHIEVEMENTS

Passport - GD : Selected in top 120 finalist among 800 participants in a competitive group discussion event.

Startup Challenge : Secured 2nd position in Startup Challenge by launching and operating a business.