

CAREER SUMMARY

Result-driven finance student pursuing PGDM in Financial Management with hands-on experience in Portfolio Management, valuation analysis, investment research, and financial planning support. Skilled in client servicing, portfolio evaluation, and preparing financial documentation to assist advisors in achieving client goals. Proficient in Excel, Ms Powerpoint, Power BI, and data-driven reporting with strong communication and organizational abilities.

EDUCATION

2024 - 2026 **Post Graduate Diploma in Financial Management**

2021 - 2024 **Bachelor of Arts (English Hons)**

CERTIFICATIONS

Principles of Wealth Management | Inclusive Wealth Management: Best Practices | Financial Modelling and Forecasting | Accounting Foundation | Corporate Finance Foundation | Corporate Analysis Financial Statements |

INTERNSHIP & EXPERIENCE

Finance Intern | The Gainers. Financial Advisor | Noida | April 15 - July 24

- Gained hands-on exposure to wealth management by analyzing mutual fund performance, market trends, and investor behavior.
- Worked Closely with Senior advisors in assessing client risk profiles and goals, helping onboard two new clients with customized plans.
- Independently led a research project analyzing gaps between investors perceived and actual risk tolerance, generating insights for improved advisory strategies.
- Strengthening analytical, communication, and decision-making skills through continuous interaction with real client cases and financial data.

Social Internship | Saukhyam Pads | Kerala | January 01 – January 15

- Contributed to SDG 5 (Gender Equality) & SDG 12 (Responsible Production and Consumption) and enhancing the NGO's online presence.
- Spearheaded social media and awareness campaigns promoting reusable pads, supporting sustainability goals aligned with SDG 12 and 13.
- Collaborated virtually with teams to analyse cultural barriers and strengthen strategies, gaining skills in qualitative research and impact communication.

ACADEMIC PROJECTS

- **Portfolio Optimization & Risk Analysis** - Built a diversified 5-stock portfolio using five-year historical data and performed Excel Solver-based optimization, volatility analysis, beta calculations, and scenario modelling. Developed a fund-style portfolio performance report summarizing risk-return metrics and optimization outcomes.
- **Strategic & Valuation Analysis – Adani Wilmar** - Performed in-depth strategic assessment and preliminary valuation using SWOT, industry mapping, and DCF-driven value assumptions. Prepared a concise valuation brief outlining financial drivers, competitive positioning, and long-term growth prospects.
- **Financial Statement Analysis – HCL Technologies** - Conducted a comprehensive assessment of HCL's financial health using profitability, liquidity, solvency, and efficiency ratios. Delivered a structured analysis highlighting key performance trends and risk indicators, supported by clear, audit-ready documentation.

SKILLS

Valuation Techniques (DCF, Comparable Company Analysis, Forecasting) | Portfolio Management | Risk Profiling | Financial Statement Analysis | Ratio Analysis | Data Interpretation |

TOOLS

Power BI | Advance Excel | MS Powerpoint | MS Word | R studio | Python (Beginner Level) | Nvivo

POSITIONS OF RESPONSIBILITY

- **Finance(FSE) Club Co-Head:** As the FSE Club Representative, I manage all club-related activities, overseeing the process from planning to execution.
- **Served as a panelist in Union Budget discussions**, contributing insights on fiscal policies and their implications for public and private sectors.
- **Event Organizer:** Organized high profile events FIIB Research Conference, SAMAVESH, from inception to execution, managed team building.
- **Event Management:** Managed guest events, efficiently both behind the scenes and at the forefront to ensure smooth execution and engagement at FIIB.