

SHUBHAM MUKHERJEE



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SUMMARY

Analytical Equity Research Intern known for high productivity and efficient task completion. Possess in-depth knowledge of financial modeling, market trend analysis, and investment strategy development. Excel in critical thinking, problem-solving, and communication, leveraging these soft skills to deliver actionable insights and support informed investment decisions.

SKILLS

- Financial analysis
- Equity research reporting
- Portfolio optimization
- Presentation development
- Investment strategy formulation
- Effective communication
- Critical thinking
- Investment research
- Company profiling
- Industry analysis
- Financial statement analysis
- Portfolio analysis

EXPERIENCE

EQUITY RESEARCH INTERN, 03/2025 - 09/2025

Quadratic Financial Services Private Limited, Mumbai, India

- Conducted financial statement analysis and valuation on listed firms across sectors.
- Assisted in drafting equity research reports with investment recommendations.
- Developed a mutual fund portfolio optimization model using Modern Portfolio Theory (MPT).
- Performed industry and peer comparisons to spot undervalued opportunities.
- Prepared detailed reports summarizing research findings and insights.
- Conducted research on market trends and investment opportunities.
- Collaborated with senior analysts to refine investment recommendations.
- Assisted in creating presentations for internal and client meetings.
- Participated in client meetings to present findings from ongoing research projects.
- Monitored daily stock movements across multiple sectors to detect changes in investor sentiment towards individual stocks or entire industries.

ACADEMIA

Atal Bihari Vajpayee Vishwavidyalaya, Bilaspur, Chhattisgarh, 08/2023

Bachelor of Commerce (Honours): Commerce

Delhi Public School, Bilaspur, Chhattisgarh, 03/2020

Senior School Certificate (CBSE): Commerce

Delhi Public School, Bilaspur, Chhattisgarh, 03/2018

Secondary School Certificate (CBSE)

LANGUAGES

Bengali: First Language

English:

C2

Proficient (C2)

Hindi:

C2

Proficient (C2)

PROFESSIONAL CERTIFICATIONS

- JP Morgan – Introduction to Investment Banking (2024–25)
- Open Learn – Understanding and Managing Risk (2024–25)
- Great Learning – Fundamentals of Artificial Intelligence (2024–25)
- United Nations (UNICEF) – Agora Certification (2022–23)

ACCOMPLISHMENTS

- Bronze medal – SOF International English Olympiad (2017)
- Winner – school debate competition (2018)
- Recognized by the Central Vigilance Commission for promoting transparency and ethics in 2022

ACTIVITIES AND HONORS

Dissertation & Publication – ABVV (2023)

- Authored a research paper “Customer Satisfaction with South East Central Railway Services”.
- Conducted primary data collection through surveys and interviews, analyzing service quality metrics
- Research findings were peer-reviewed and published in the academic journal “Jamshedpur Research Review” (2025).