



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
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- Delhi Public School**, Bilaspur, Chhattisgarh, 03/2020
Senior School Certificate (CBSE): Commerce
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- Delhi Public School**, Bilaspur, Chhattisgarh, 03/2018
Secondary School Certificate (CBSE)

LANGUAGES

- Bengali:** First Language
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|-----------------|----|-----------------|----|
| English: | C2 | Hindi: | C2 |
| Proficient (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).