

# Gurleen Singh

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## SKILLS SUMMARY

- **Tools/Platforms:** MS-Excel , Power BI, Canva, Tableau , MS-Word, Power Point
- **Soft Skills:** Leadership, Adaptability, Time Management, Team Work, Problem Solving

## INTERNSHIP

- **Bajaj Capital** June 2025 – August 2023  
*Wealth Management Intern*
- **Advised** clients on mutual funds, SIPs, and insurance products, successfully generating over **₹5,000/month in new SIP inflows**
- **Designed** customized, goal-based financial portfolios for clients, aligning investment strategies with life goals such as home purchase, education, and retirement
- **Analyzed** top-performing mutual funds and insurance schemes using AMFI, IRDAI, and market research data to support informed client decisions
- **Bajaj Finserv** October 2023 – November 2023  
*Sales Executive Intern*
- **Pitched** diverse financial products to customers while assisting in the processing of loan applications and service requests
- **Maintained** accurate client records and documentation to ensure smooth loan processing and compliance with company standards
- **Achieved** sales targets by building rapport with clients, resolving queries, and contributing to monthly revenue goals

## PROJECTS

- **ICICI Bank Financial Modelling – Lovely Professional University** April 2025 – May 2025
- Conducted a comprehensive financial analysis of ICICI Bank, evaluating profitability, liquidity, solvency, and efficiency ratios
- Built a detailed financial model projecting income statement, balance sheet, and cash flow using historical data
- Applied DCF, Relative Valuation, and Residual Income methods to estimate intrinsic value and provide investment recommendations
- **Financial Ratio Analysis – Lovely Professional University** February 2025 – April 2025
- Performed a detailed **comparative financial** analysis of three leading textile companies, focusing on key ratios including liquidity, profitability, efficiency, and solvency
- Evaluated financial statements to **identify trends**, assess business performance, and benchmark industry
- Delivered **insights and strategic recommendations** based on quantitative findings, enhancing decision-making and financial interpretation skills
- **Tata Steel Financial Analysis – Lovely Professional University** August 2024 – September 2024
- Conducted a detailed **financial analysis** of Tata Steel and JSW Steel, focusing on liquidity, profitability, and solvency
- Performed **comparative analysis** to evaluate the financial health and performance of both companies
- Provided **interpretations** and strategic **recommendations** based on the analysis
- **Professional Development And Networking** August 2024 – September 2024
- Facilitated a **networking** activity using Quick Canvas with students
- Gathered **feedback** through Quick Canvas sketch interviews, gaining insights into student preferences and experiences
- Captured photographs of each student with their sketch, creating a memorable record of the advice given

TRAINING

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- **ICICI Bank** July 2023 – August 2023  
*Sales Executive Trainee*
- **Pitched** customers towards various other products, ensuring they were well-informed about the full range of offerings available to them
- Processed their loan applications, which involved understanding the complexities of **loan approvals**, verifying and documenting important papers, and addressing customer queries effectively

CERTIFICATES

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- Financial Modelling and Valuation | EY March 2025
- SDC Power BI and Tableau | Lovely Professional University November 2024 – December 2024
- Microsoft Excel with AI | Lovely Professional University September 2024 – October 2024
- Power BI Micro Course | Learn More Pro September 2024

ACHIEVEMENTS

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- **Secured 2<sup>nd</sup> Rank** February 2024  
Participated and ranked 2nd in the 100 m race organized | People’s University
- **Secured 2rd rank in the Management Games 5.0** February 2024  
Participated and ranked 2rd in the Management Games organized | People's University
- **UGC Brand Ambassador at University** September 2023  
Selected as a brand ambassador for UGC department | People’s University
- **NCC A Certificate** January 2018  
Earned NCC A Certificate, showcasing leadership, discipline, and teamwork

EDUCATION

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- **Lovely Professional University** Punjab, India  
*Masters of Business Administration* Since July 2024
- **Peoples University** Bhopal, Madhya Pradesh  
*Bachelor’s of Business Administration* October 2021 - June 2024