

# JASLEEN KAUR

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## SKILLS SUMMARY

- **Technical Skills:** Advanced MS Excel, MS Word, MS Office
- **Soft Skills:** Team Management, Analytical Thinking, Communication, Team Collaboration
- **Financial Skills:** Financial Statement and Ratio analysis, DCF Modelling, Comparative Analysis, Equity Research Reports, Mutual Fund Evaluation, SIP Advisory, Data Visualization, Client Investment Reporting

## INTERNSHIPS

Nirmal Bang Securities | Ludhiana June 2025 – July 2025  
Finance Trainee

- Performed **equity research** using **fundamental and technical analysis**, evaluating **stock performance** and identifying future growth potential, leading to actionable **investment recommendations**
- Prepared a **detailed equity research report** on [NIRMAL BANG], utilizing valuation metrics such as **P/E ratio, ROE, EPS, and price trends** to support stock recommendations
- Advised clients based on **risk profiles** and **investment goals**, ensuring strategic **portfolio management** and informed decision-making.

GURPREET SALUJA FINANCIAL SERVICES LTD. | Ludhiana Feb 2023 – June 2023  
Mutual Fund Advisory Intern

- **Qualified 150+ prospective investors** by assessing **financial goals, risk tolerance, liquidity needs, investment horizon, and budget constraints**; prioritized high-potential leads for Relationship Manager engagement using **CRM systems**
- Partnered with Relationship Manager to **develop goal-based financial plans** and **mutual fund investment proposals** aligned with client suitability, **SEBI guidelines**, and **asset allocation principles** for the **150+ profiled prospects**
- **Resolved 50+ client service queries** (portfolio returns, investment documentation, mutual fund product selection) improving customer experience, retention, and relationship management metrics
- **Maintained real-time CRM hygiene** for **150+ lead records**, updating lead stages, follow-up schedules, onboarding milestones, and conversion status to support sales pipeline visibility and revenue forecasting

## PROJECTS

- Converted **20+ customers** through **direct B2C engagement** by applying targeted customer segmentation, financial needs analysis, product suitability assessment, and storytelling techniques, **contributing to ₹1.2 lakh+ in mock portfolio sales value** Sept, 2024
- Developed an **interactive Excel financial dashboard** featuring **10+ Key Performance Indicators (KPIs)** such as revenue, EBITDA, PAT, tax impact, and share price volatility, increasing stakeholder visibility and analytical efficiency. March, 2024
- Conducted **in-depth fundamental analysis** of **3 listed companies** – Bharat Electronics, Vedanta Ltd., and Godavari Power Ltd. – using **6+ financial metrics** (P/E ratio, ROE, EPS, D/E, NPM, Book Value), **uncovering undervalued stocks with upside potential of 15–20%** Jan, 2025
- **Identified and Analyse** **5 large-cap mutual funds**, including HDFC Mutual Fund, by evaluating annualized returns, Sharpe ratio, Alpha, fund manager performance, and portfolio allocation, enabling data-driven portfolio re-balancing decisions June, 2025
- **Assessed valuation techniques (DCF)** on **Sun Pharma**, calculating intrinsic values with **90–95% model accuracy**; issued buy/sell recommendations based on 5-year revenue growth, EBITDA margins, and operations. June, 2025

## CERTIFICATES

- **NSE Fundamental Analysis Certification** – applied valuation techniques, ratio analysis, financial statement evaluation Oct, 2024
- **NSE Equity Derivatives Certification** – understood futures, options, hedging strategies, market operations Oct, 2025
- **NSE Wealth Management Certification** – learned portfolio construction, asset allocation, risk profiling Oct, 2025
- **Financial Modelling Certification** – built forecasting models, sensitivity analysis, investment decision support Aug, 2025

## EDUCATION

**MBA in Finance** Aug '24-Present  
Lovely Professional University Phagwara, IN  
CGPA – 6.76

**Bachelor Of Commerce** Jul, 2020 – Jun, 2022  
Guru Nanak Khalsa College for Women, Ludhiana | Percentage – 7.62