

Upanshu Behl

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SKILLS SUMMARY

- **Tools/Platforms:** MS-Word, MS-Excel, PowerPoint, Trading View, Google Sheets, Google Docs
- **Soft Skills:** Communication, Team Player, Meticulousness, Decision Making, Multitasker, Highly Organized, Adaptability, Leadership

WORK EXPERIENCE

- **Office Administrator | Sareen Lingua World | Jalandhar** July 2022 - August 2024
 - Administered daily office operations, **ensuring a smooth workflow** and **adherence** to institutional policies
 - Maintained and updated records for over **500+ students**, **ensuring 100% accuracy**, confidentiality and data integrity
 - Facilitated office staff with **administrative tasks**, including data entry and document management
 - **Resolved 100+ students** and customer inquiries with clear and **timely communication**, improving service satisfaction
 - **Coordinated** class schedules and **assisted** with logistics, materials, meetings and events of the organization **enhancing operational efficiency and resource optimization**

INTERNSHIP

- **Investment Banking Intern | Samvedanam Consulting | Chandigarh** June 2025 - July 2025
 - Contributed to **two live mandates** — a **fundraising** deal in the EV sector and an **M&A** transaction in the Insurtech space — by supporting deal execution in a lean, high-responsibility setup
 - **Independently mapped and profiled 86+ investors** using Tracxn, Crunchbase, Apollo.io, ChatGPT, and Excel, enabling focused outreach and saving **~10–15 hours of analyst's time**
 - Conducted market, industry, and **investor research** to support strategic positioning and preparation of investor communication materials
 - Handled **confidential** client financials **under NDA** and contributed inputs to internal memos, teasers, and investor briefing notes
 - Participated in client meetings and internal discussions, gaining firsthand exposure to **investor expectations**, negotiation dynamics, and the full **deal lifecycle**

PROJECTS

- **Back testing Options Strategies – Sun Pharma (NSE F&O) | Lovely Professional University** November 2025
 - Conducted a **1-month back test** of **5 option strategies** (Straddle, Strangle, Protective Put, Covered Call, Collar) using November 2025 expiry contracts
 - Classified **ITM/ATM/OTM strikes** using spot price methodology and executed calculations with historical daily option chain data
 - Computed **daily P&L, cumulative P&L, and payoff behavior** with transaction cost adjustments and **built a structured Excel model** including price feed, payoff logic, strategy comparison charts, and profitability evaluation
 - Identified **strategy performance patterns** under changing volatility, time decay, and directional movement
- **Portfolio Optimization and Asset Allocation | Lovely Professional University** October 2025
 - Performed **daily and annualized return** analysis for a **5-stock NIFTY portfolio** and constructed the variance–covariance and correlation matrices
 - Built the **Markowitz Minimum Variance Frontier** and Efficient Frontier using Excel Solver, determining optimal weights across multiple target returns
 - Computed the **Global Minimum Variance Portfolio** for both long-only and unconstrained setups, estimating expected annualized return and risk
 - Constructed the **Capital Allocation Line** using a given risk-free rate and identified the **Optimal Risky Portfolio**
- **M&A Deal Analysis – IDFC Ltd & IDFC First Bank | Lovely Professional University** March 2025
 - Conducted **in-depth financial and strategic analysis** of a reverse merger, projecting **significant EPS growth** (from **₹0.23 to ₹2.08**) and ROE improvement (from **5-6% to 13-15%**)
 - Evaluated the **strategic rationale** of the merger for **enhancing shareholder value** and **capital efficiency** (3000 Cr cash infusion), demonstrating potential for higher returns on equity (ROE) for the **combined entity**
 - Presented key findings and strategic implications, including share dynamics analysis based on a **1.55 exchange ratio**, to a panel of **3 industry experts** during a boardroom-style M&A challenge

CERTIFICATIONS

- Investment Banking Job Simulation | JP Morgan | The Forage April 2025
- Certification in Financial Modelling and Valuation | Ernst & Young March 2025
- IELTS Teacher Training Certificate | IDP | Jalandhar April 2023

EDUCATION

- **Lovely Professional University** Phagwara, Punjab, India
Master of Business Administration – Investment Banking; CGPA: 8.29 Since August 2024
- **Guru Nanak Dev University** Jalandhar, Punjab, India
Bachelor of Commerce; Percentage: 60.95 September 2021- July 2024