



# Sumedha Kumari

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## CAREER SUMMARY

Detail-oriented finance professional skilled in financial statement analysis, ratio and cash flow evaluation to support investment appraisal and performance assessment. Experienced in quantitative research and interpreting financial data to provide actionable insights. Committed to contributing analytical rigor and improving financial processes in a collaborative environment.

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## EDUCATION

2024 - 2026	<b>Post Graduate Diploma in Management</b>	Fortune Institute of International Business (FIIB)
2019 – 2022	<b>Bachelor of Arts</b>	Lucknow University

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## INTERNSHIP & EXPERIENCE

### Wealth Manager | The Gainers | Noida

- Assisted in analyzing client needs, risk appetite, and financial goals to recommend suitable mutual fund schemes. Gained exposure to SIPs, asset allocation, fund categories (equity, debt, hybrid), and participated in client interactions during financial planning discussions.
- Successfully contributed to business development by onboarding **5 new clients**, supporting the firm's mutual fund advisory and strengthening client relationships.
- Developed strong practical understanding of mutual fund planning, client communication, and investor profiling. Enhanced confidence in explaining financial products and applying wealth-management concepts in real advisory situations.

### Friends And Smile (Social internship) | Noida

- Created and executed a marketing plan for promoting AHA-certified BLS training course.
- Organized a fundraising event at V3S mall, handling end-to-end planning and vendor coordination.
- Enhanced outreach efforts through strategic client engagement, boosting awareness and fundraising.

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## SKILLS

Financial Statement Analysis| Ratio Analysis| Cash Flow Analysis| Portfolio Management| Valuation| Report Writing| Teamwork| Adaptability| Analytical Thinking

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## TOOLS

- Power BI
- Power Point
- MS word
- MS Excel

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## Academic Projects

- Analyzed Cipla's financial statements, including income statement, balance sheet, and cash flow, to assess company performance and identify key financial trends.
- Conducted Mutual Fund categorization using Risk–Return analysis by evaluating fund performance, volatility, and Sharpe ratios to classify schemes into appropriate risk profiles.
- Developed a comprehensive financial plan for a client by conducting detailed profiling, assessing financial goals, income, and risk tolerance, and designing a customized investment and implementation strategy.