

Shubhangini Kanwar

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SKILLS SUMMARY

Tools/Platforms: MS-Office, MS-Excel, PowerPoint, Google Sheets, Canva, Power BI, Python – Beginner, Tableau

Power Skills: Negotiation, Adaptability, Problem solving, Team player, Critical thinking, Communication skills

Financial Skills: Financial Modeling, Valuation, Portfolio Management, Risk Analysis, Equity Research

INTERNSHIP

Omnifin Valuation Services (OPC) Pvt. Ltd. | Kolkata

Jun 2025 – Aug 2025

Finance Intern

- Drafted the **Business Responsibility and Sustainability Report (BRSR)**, assisting the firm in meeting regulatory compliance requirements
- Conducted valuation research for a K–12 educational institution, supporting detailed financial analysis
- Performed sectoral research on **Alternative Investment Funds, Renewable Energy, EPC (Engineering, Procurement & Construction), and E-commerce**, contributing to market insights reports.
- **Skills learned:** Financial Modeling, Valuation Research, Sustainability Reporting, Industry Analysis, and Report Drafting

PROJECTS

Portfolio Construction and Performance Analysis | Lovely Professional University

Aug 2025 – Sep 2025

- Constructed a diversified equity portfolio with an investment allocation of **₹50 lakhs**, targeting retirement savings and wealth creation
- Applied **Modern Portfolio Theory (MPT)** and **CAPM** to optimize risk–return trade-offs.
- Calculated key metrics such as **Expected Return (CAGR), Beta, and CAPM-based required returns**
- Monitored the portfolio's **live performance**, analyzing deviations from expected values

Fundamental Analysis of HDFC Bank | Lovely Professional University

Mar 2025 – Apr 2025

- Conducted a comprehensive fundamental analysis of **HDFC Bank** using financial statements, ratio analysis, and valuation methods
- Evaluated the bank's financial health through profitability, liquidity, valuation and solvency ratios
- Performed **SWOT** analysis and assessed market position using key metrics like **EPS**, P/E ratio, **ROE**, and NPA levels
- Interpreted trends from annual reports and recommended investment strategies based on long-term performance

Ratio Analysis Project – Thermax Limited | Lovely Professional University

Sep 2024 -Oct 2024

- Performed a comprehensive **ratio analysis** on Thermax Limited's financial statements, focusing on key metrics like liquidity and solvency ratios
- Generated insights from financial data and created an extensive report to assist in decision-making, improving both internal financial monitoring and external reporting accuracy
- Suggested strategic measures based on financial trends and performance to enhance Thermax Limited's financial health and future growth

CERTIFICATIONS

- Varsity Certified – Financial Markets (Zeroth Varsity) May 2025 – Jun 2025
- Financial Modelling and Valuation – Ernst & Young (EY) Feb 2025 – Mar 2025
- Behavioral Finance – Great Learning Academy Sep 2024 – Oct 2024
- Financial Accounting - Great Learning Academy Sep 2024 – Oct 2024

EDUCATION

- **Lovely Professional University** Phagwara, Punjab
Master of Business Administration- Investment Banking and Financial Markets Aug 2024- Aug 2026
- **(USOL) Panjab University** Chandigarh
Bachelor of Commerce May 2023

