



Rasmi Ranjan Tripathy

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MBA Finance candidate skilled in valuation, financial modeling, and investment analysis. Experienced in building forecast models and automating financial workflows. Seeking an Investment Banking Associate role in due diligence and transaction execution.

Skill Set Summary

- **Financial Modelling & Valuation:** DCF Analysis, LBO Modelling, M&A Modelling, 3-Statement Modelling, Precedent Transactions, Comparable Company Analysis, Scenario & Sensitivity Analysis
- **Technical Skills:** Advanced Excel, VBA, Macros, Power BI, Capital IQ, Bloomberg Terminal, Monte Carlo Simulation, Regression Analysis, Data Visualization
- **Financial Analysis:** Financial Statement Analysis, Due Diligence, Investment Thesis, Risk Assessment, KPI Tracking, Financial Forecasting, Portfolio Management
- **Capital Markets:** M&A Process, Leveraged Finance, Pitch Books, Investor Reporting, Financial Storytelling, Equity Research
- **Soft Skills:** Client Advisory, Cross-Functional Collaboration, Critical Thinking, Problem-Solving, Strategic Negotiation

Professional Experience

Bajaj Capital Limited, Delhi
Wealth Management Intern
(June 2025 – August 2025)

- Analyzed client risk profiles and investment objectives to develop personalized equity and fixed-income portfolios, optimizing asset allocation for 50+ clients.
- Led financial literacy workshops on mutual funds and capital markets, increasing client engagement with advisory services by 25%.
- Supported senior advisors by preparing pitch books and investment memorandums, facilitating data-driven discussions on portfolio rebalancing.

Tech Mahindra, Bhubaneswar
Process Associate
(February 2024 - June 2024)

- Identified inefficiencies in financial workflows, reducing average handling time (AHT) by 20% and improving productivity for expense tracking and reconciliation.
- Resolved 95% of high-priority customer issues using analytical troubleshooting, enhancing client satisfaction and operational efficiency.
- Designed interactive Power BI dashboards to automate KPI tracking (ROI, cost trends), improving reporting efficiency by 15%.

Certifications

- NISM Investor Awareness Certification
- Data Visualization (Forge - TATA Group)

Key Projects

Integrated 3-Statement Financial Model | Tech Startup Valuation

- Developed a dynamic 3-statement model projecting 22% CAGR over 5 years for a tech startup, forecasting revenue, EBITDA, and unlevered free cash flow.
- Performed regression analysis on historical data to model key drivers including customer acquisition cost and churn rate.
- Conducted sensitivity analysis on WACC and terminal growth rate, establishing a valuation range of \$80M–\$120M.

Monte Carlo Simulation for Portfolio Risk Analysis

- Simulated 10,000+ market scenarios to evaluate Value at Risk (VaR) and Expected Shortfall for a multi-asset portfolio.
- Optimized asset allocation to reduce portfolio VaR by 25% while maintaining target returns.
- Built an interactive Excel dashboard using VBA to visualize risk-return trade-offs and support investment decisions.

Achievements

- Ranked 1st in Budget Expectation Competition 2025.
- Active Member, Royal Millennium Club, Bhubaneswar.
- Consistently profitable options trader with strong analytical execution.

Education

Pursuing MBA in Finance & Business Analytics | 2024–2026

Doon Business School Global University

Relevant Courses: Financial Modelling, Corporate Finance, Investment Analysis, Business Analytics

Bachelor of Commerce (Accounts & Finance)

Prananath Autonomous college, Utkal University, Bhubaneswar

Intermediate in Commerce (Financial Management Accounting)

Prananath Junior College, Utkal University, Bhubaneswar

Others

Languages: English, Hindi, Odia

Interests: Financial Markets, Trading, Creative Writing