

JANVEE RAI

+91 6207954617

raijanvee10@gmail.com

Alpha II Greater Noida U.P.

ABOUT ME

Motivated PGDM student specialising in Finance, seeking an entry-level position with a strong foundation in Accounting and understanding of Financial markets, with hands-on internship experience in Mutual funds, KYC, Client onboarding, Excel and Client relations. Quick learner with a focus on accuracy, client service and continuous improvement.

INTERNSHIP

Finance Intern

Bajaj Capital Limited, Gurgaon, Haryana | May 2025 - July 2025

- Assisted in preparing and managing the client's investment portfolio, supporting effective wealth management practices
- Ensured a smooth client onboarding process by collecting and verifying KYC documentation with accuracy.
- Gained practical knowledge of mutual funds, insurance, and basic financial planning concepts.
- Developed strong teamwork and corporate communication skills through hands-on exposure in a professional environment.

Wealth Management Intern

IDFC Mutual Funds, Ranchi, Jharkhand | August 2021 - October 2021

- Supported client service by handling mutual funds transfers, withdrawals, and addressing basic investment queries.
- Maintained accurate client records and verified documentation to ensure compliance and data integrity.
- Developed strong organisational and client management skills

PROJECTS UNDERTAKEN

Mutual Fund Analysis | July 2025

- Analysed mutual fund performance using key metrics such as NAV, AUM, and historical returns to support informed investment decisions.
- Gained practical understanding of fund evaluation, selection strategies, and market trends.
- Utilised Excel to organise and manage KYC data and client information, improving data accessibility and efficiency.

SKILLS

- MS Excel
- Power BI (Beginner)
- MS Suites
- Financial Modelling (Basic)
- Teamwork & Collaboration

CERTIFICATIONS

- NISM Series V-A (Mutual Fund Distributors) | 2025
- Financial Analytics Programme - Grant Thornton 2025
- Prompt Engineering | 2025
- Business & Sustainable Development - NPTEL | 2024

EDUCATION

PGDM- Finance | 2024 - 2026

GL Bajaj Institute of Management & Research, Greater Noida, U.P.

Bachelor of Business Administration | 2019 - 2022

Dr Shyama Prasad Mukherjee University, Ranchi, Jharkhand

Class 12 (CBSE) - Commerce | 2018 - 2019

Agrasen DAV Public School, Jharkhand

Class 10 (CBSE) | 2016 - 2017 Agrasen DAV Public School, Jharkhand