

## **JOB DESCRIPTION**

### **About us: -**

Fundsroom is a recognized Fintech platform under Start-up India that provides one single platform for all major investment asset classes ranging from Stocks, Mutual funds, Digital Gold, Insurance, Real estate, and Banks.

Essentially, we bridge the gap between the customers and service providers through our platform.

Fundsroom is a registered start-up under AMFI, BSE, and Start-up India

Fundsroom has an active customer base of more than 2 lac+, manages more than AUM of 100+ crore rupees, and is one of the fastest emerging Fintech start-ups within the region and country.

### **Roles Offered: - Equity Analyst**

### **Job responsibilities: -**

- Create (7-14) active portfolios from the given service provider.
- Conduct in-depth fundamental analysis of companies, focusing on financial performance, industry dynamics, and competitive positioning.
- Analyze and interpret a wide range of financial statements and industry reports to identify investment opportunities.
- Create detailed financial models to evaluate the potential value and risk of investment opportunities.
- Assist in the preparation of investment reports and presentations for internal and external stakeholders.
- Monitor and track portfolio holdings, providing regular updates on performance and market trends.
- Stay updated on market news, economic developments, and industry trends that may impact investment decisions.
- Collaborate with team members on ad-hoc projects and research assignments as needed.

### **Requirements**

- Currently pursuing a bachelor's or master's degree in finance, economics, or a related field
- Strong analytical and quantitative skills, with the ability to interpret and manipulate financial data.
- Excellent written and verbal communication skills, with the ability to present findings clearly and concisely.
- Decent Proficiency in Microsoft Excel and other financial analysis tools
- A strong team player with the ability to work collaboratively in a fast-paced environment.
- A genuine interest in financial markets and investment strategies.

**Note:**

1. Duration: - 45 days (can be extended as per the performance)
2. Mode of Internship: - work from home
3. Timing: 2-3 hrs. a day
4. Stipend: 2000-5000\* [Depending upon the performance]

**Eligibility: -**

1. Good Communication, Innovative approach, and analytical skills
2. Basic Knowledge of Data research, analysis, and representation
3. Candidates from Finance/Business/operations analytics or related management background must.
4. Genuine Interest in investment and trading.

**Perks & Benefits: -**

1. Workplace training in Data analysis and software related to it [Power BI, Tableau, click view, Google Analytics]
2. Basic training in Data research, quiring, sorting, gathering, and analysis for business reports.
3. On successful completion of the first month, the candidate will be promoted to a full-time internship where the area of work will be related to the Domain applied work or as a Team leader.
4. Future career options with Fundsroom [PPO], LOA, and LOR (letter of recommendation).
5. Data analysis, Power BI, E certificate on successful completion of total work.
6. Stipend will be available in a range of Rs 2000-5000\* (considering 7-14 portfolios are completed and the overall report is completed)
7. E-books regarding fundamental analysis, technical analysis, risk management, intraday Trading.

## CASE STUDY

### What is the internship about?

The internship is divided into two modules:

Module 1: Product and business domain understanding

Module 2: Equity Research, Business Analysis, and Portfolio Management.

### MODULE 1 – 10 Days: -

1. To onboard Investors/ Traders through Friends/family/colleagues and create a minimum portfolio of 7-14 investors for trading purposes.
2. To {gather, sort, filter, analyze, and represent} Data for Better investment decisions.
3. To create data reports and represent them through various business analytics tools [Power BI]
4. To Trade and invest in the stock market [live trading] and convey regards to data techniques for better investment decisions
5. To create Market and data analysis reports and represent them through various technical and analytical tools and platforms.

### MODULE 2 – 20-40 Days:

#### Equity Analyst Intern

1. To Develop and refine predictive models for stock price movements, volatility, and other relevant metrics by using data analytical tools.
2. To Create comprehensive reports, dashboards, and visualizations to present data for various investment asset classes.
3. Analysing data from multiple sources to predict changes in consumer demand for products or services and market scenarios and representation of data through analytical tools [POWER BI, CLICKVIEW, TABLEAU].
4. Preparing Trading reports on market trends, trade statistics, and candlestick patterns by analyzing data and using comprehensive tools.
5. Gathering and assessing securities/equity data including industry-related stocks and bonds.
6. Analysing company financial reports to determine the market performance of existing securities by assessing balance sheets, P&L accounts, and financial statements.

Using financial software and data analyzing tools [Excel, Trade view, SQL]and comprehensive methodologies to create financial forecasts and budgeting.