

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 700+ crore rupees and is one of the fastest emerging Fintech start-ups within the region and country.

Roles Offered: - Portfolio Management Analyst /Equity Research Analyst/ Investment Analyst

Job responsibilities: -

- Create and manage (7-15+) active portfolios from the given service provider.
- Assist in conducting market research and analysis to support investment decision-making for the investors
- To onboard new clients by opening their trading accounts and manage their investment portfolios by assisting them with investment in the stock market
- Creating financial and investment portfolios with the knowledge of basic fundamental and technical analysis methodology
- Help monitor and evaluate current portfolio holdings, identifying trends and potential risks
- Learn to develop and implement investment strategies aligned with clients' financial goals
- Support the portfolio management team in creating financial models and forecasting investment returns
- Participate in client meetings and assist in preparing investment proposals and presentations
- Collaborate with the research team to identify new investment opportunities and conduct due diligence
- Contribute to the development and improvement of portfolio management policies and procedures

Requirements

- An undergraduate or graduate student pursuing a degree in finance, economics, or a related field
- Strong analytical skills with the ability to interpret financial data and market trends
- Excellent attention to detail and a high level of accuracy when working with numerical information
- Proficiency in Microsoft Excel and other financial analysis tools
- Effective written and verbal communication skills
- Highly organized, with the ability to manage multiple tasks and meet deadlines
- 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 Business/operations analytics or related management background must.

Perks & Benefits: -

1. Training related to investment, and trading [fundamental, technical analysis] by using tools, software related to it
2. Workplace training in Data analysis and software related to it [Power BI, Tableau, click view, Google Analytics]
3. Basic training in Data research, quiring, sorting, gathering, and analysis for business reports
4. 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.



5. Future career options with Fundsroom [PPO], LOA, and LOR (letter of recommendation).
6. Investment analyst, Super Portfolio Management, Data analysis, PowerBI, E certificate on successful completion of total work.
7. Stipend will be available in a range of Rs 2000-5000* (considering 7-14 portfolios are completed and the overall investment 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:

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

