

Daksh Lodha

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EDUCATION

JAGSoM (Jagdish Sheth School of Management)

Bengaluru

Post Graduate Diploma in Management (PGDM) / MBA

Expected Apr 2024

- **Specialization:** Finance (Capital Markets) | **CGPA:** 7.5
- **Relevant Coursework:** Corporate Finance, Equity and Derivatives, Trading Strategies, Portfolio Management, Financial Statement Analysis, Financial Risk Management and Fixed Income.
- **CFA Level 1 (Candidate)**

WORK & LEADERSHIP EXPERIENCE

Delta Partners

New Delhi

Research Analyst Intern

Nov 2023 – Jan 2024

- Worked with financial models to evaluate company performance and financial health.
- Demonstrated proficiency in crafting and executing different portfolio strategies to achieve optimal returns.
- Developed and implemented a Nifty 50 portfolio strategy consistently outperforming the index by a minimum of **3-5% alpha annually**.
- Conducted thorough equity research utilizing diverse screen filters, incorporating both fundamental and technical analysis to identify investment opportunities and inform decision-making.

Student Managed Investment Fund (SMIF)

Bengaluru

Equity Analyst

Jan 2023 – Jan 2024

- Currently, serving as the Equity Analyst of Student Managed Investment Fund, leading the research team, overseeing the fund's investment strategy, asset allocation and risk management with **₹20 lakhs in assets (real money)**, resulting in an annual return of **27.8%**.
- Utilized momentum analysis to assess the short-term performance and trends of selected stocks, ensuring alignment with the fund's investment goals.
- Conducted in-depth research on potential investment opportunities using both fundamental and technical analysis to identify stocks with growth potential.

DSC LTD

Ramganjmandi

Junior Manager

May 2020 – May 2022

- My impact on the family business as a manager has been evident in a significant increase in sales and successful expansion of the wholesale operation.

ACADEMIC & INDUSTRY PROJECTS

INFOMERIC RATING

July 2023 – Oct 2023

- Infomerics Rating Compliance
- This involved developing a robust procedure for compliance documentation, due diligence documentation and disclosure requirements.
- To gain insight into the documentation compliance gaps identified by SEBI (Securities and Exchange Board of India) in the context of other Credit Rating Agencies.
- Evaluated the current documentation process and provided actionable recommendations to enhance efficiency and reduce the time and effort required for documentation.

Certifications

- **NISM:** Series-XV: Research Analyst and Series-VIII: Equity Derivatives Certification, Cleared **CA-CPT (2017)**
- **Terminal:** Corporate Finance Institute - Capital IQ Fundamentals and Bloomberg Market Concept

SKILLS, ACTIVITIES & INTERESTS

- **Skills:** Tableau, Financial Modelling, SQL (Basic), Excel, PowerPoint, Accounting, Treasury, Risk Management, Fundamental Valuation, Prowess IQ, Analytical thinker, Investment Advisor.
- **Languages:** Fluent in English, Hindi,