

Daksh Lodha

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EDUCATION

JAGSoM (Jagdish Sheth School of Management) <i>Post Graduate Diploma in Management (PGDM) / MBA</i>	Bengaluru <i>Expected Apr 2024</i>
<ul style="list-style-type: none">• 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 <i>Research Analyst Intern</i>	New Delhi <i>Nov 2023 – Jan 2024</i>
<ul style="list-style-type: none">▪ 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) <i>Equity Analyst</i>	Bengaluru <i>Jan 2023 – Jan 2024</i>
<ul style="list-style-type: none">▪ 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 <i>Junior Manager</i>	Ramganjmandi <i>May 2020 – May 2022</i>
<ul style="list-style-type: none">▪ 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
<ul style="list-style-type: none">▪ 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,