MANAGEMENT INTERNSHIP PROGRAM 2021

**Annexure II**

**Mukesh Patel School of Technology Management and Engineering**

**Management Internship Program**

**Project Proposal**

Preliminary Details

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| --- | --- |
| Name of the Student | Hardik Sharma |
| Roll No. & SAP No. | N045 & 70471017047 |
| Name of MIP Organization | Morgan Stanley |
| Project Title | Reporting Visualization & Automation |
| Project Description (100 words) | Visualization in Power Bi for Internal Risk Reporting and Automation in VBA Macros for efficient processes inside the firm. |

Important Aspects

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| Important Aspects | Details | Remark |
| Scope of Project (SoW) | * Create Custom Visuals for “Value-added” and “Valuable” reporting in Power Bi for generating internal risk report in the organization. * Process, clean and transform datasets into useful summaries via an automated platform in VBA Macros. * Explore creative tools in Power Bi to develop in-house reporting tools for risk management. * Optimizing current automated processes in order to increase efficiency. * Prepare reports on mocked-up data to present newer tools developed during the project. * Looking for ways to link Power Bi with Excel. * Understanding the working of Power Bi Cloud Services. |  |
| Methodology / Approach to be Adopted | * Understanding the gap between the present reporting tools and the expected innovations. * Learning the functionalities offered by Power Bi and the DAX expressions to perform Data Analysis. * Create various Custom Visuals as per requirement using Node.js, typescript and pbiviz package. * Create Mocked-up dataset to test the performance of the Custom Visuals. * Understanding the format of the data-dump and filtering the unwanted data. * Automating the report generation process through use of efficient programs in VBA Macros. * Generate a comprehensive report on the processed data covering all major areas. |  |
| Outcomes and Learnings for the Project | * Develop business and technical skills, to ensure effective contribution and high-quality delivery. * Gain advanced skills in Power Bi, VBA Macros and JavaScript. * Learn about internal risk management (market risk, credit risk, etc.) from select resources provided by Morgan Stanley on their E-learning platform. * Understanding the functioning and importance of risk reporting in an Investment Bank. * Learning more about the reporting standards and considerations made by top management in the cooperate world. * Delivering custom made visuals for in-house use alongside automated tools to streamline risk reporting for future purposes. |  |

Project Activity Plan (With Key Milestones Covering Scope of Project)

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| --- | --- | --- | --- | --- |
| Wk No. | Plan Date | Task Description (Outcome) | Status | Action Required/ Remark |
| 1 | 08.5.21 | Submission of IIR | Completed |  |
| 2 | 14.5.21 | Understanding project requirements & learning basics of Power Bi, DAX and Risk Management. | Completed |  |
| 3 | 25.5.21 | Submission of Project Proposal; Preparing Internal Report on Mocked up Data; Developing Custom Visual as per requirement. | Completed |  |
| 4 | 29.5.21 | Automate the Excel dataset using VBA Macros for the purpose of analysis and effective reporting on Mocked-up Data. | On-going |  |
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Hardik Sharma

Signature of Student

Tithi Mukherjee Prof. Alaknanda Lonare

Name and Signature of Industry Mentor Name and Signature of Faculty Mentor

Date: 24.05.2021 Date: