

JAGDISH MALI

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Degree	Board	Institute	% / CGPI	Year
PGDM	AICTE	N. L. Dalmia Institute of Management Studies & Research	7.86/10	2024
B.A.F	Mumbai University	K.P.B Hinduja College of Commerce, Mumbai	8.8/10	2021
Class XII	HSC	M.B.B.I Educational Society, Palghar	84.15	2018
Class X	SSC	Holy Cross High School, Mumbai	70.40	2016
WORK EXPERIENCE (4 Years)				
Manager		Neo Wealth Management (Feb'2024- Present)		
Responsibility	<ul style="list-style-type: none">Executed high-volume trading with a ₹20 Cr margin, achieving an 8% annualized yieldManaged product development for algo trading, optimizing and eliminating manual interventionWorked with fund manager for asset allocation for fixed income, arbitrage, equities, and IPOsUpdated fund performance reports for the marketing team to analyze and compare returnsConducted back testing for economic events, providing data-driven insights for investment strategiesAutomated financial models and reports using Excel formulas and Python			
Digital Acquisition Executive		Angel One (Jan'2020-March'2022)		
Responsibilities	<ul style="list-style-type: none">Business development of Demat A/c, Mutual fund, verification of KYC and client serviceLead transfer for Cross sell of insurance products such as ULIP, Health and Term insuranceRecognition by management for achieving 22% of lead conversion rate and efficiency of 130%Trained new hires on customer acquisition tools and shown techniques to gain clientele			
SUMMER INTERNSHIP (2 months)				
Research Intern		Philip Capital India (April'2023- June'2023)		
Responsibility	<ul style="list-style-type: none">Prepared 40 Con-call analysis, Store Mapping for QSR, Brand Pricing analysisPrepared 13 Q4 Equity Research reports, database for Financial Modelling and updating the financialsAssisted in detail research reports for unlisted companies QSR business			
ACADEMIC ACHIEVEMENTS				
<ul style="list-style-type: none">Secured 1st Rank at LBSIM, Delhi for Mock Trading CompetitionTop 5 National Finalist for Acquisitions Competition with reasoning and financials conducted by NIBM, Pune1st Runner Up for Business plan competition at ICFAI, HyderabadTop 5 National Finalist for suggestions on Policies and Banking role for ESG conducted by NIBM, Pune				2023 2023 2023 2023
ACADEMIC PROJECTS & CERTIFICATIONS				
Live Project	<ul style="list-style-type: none">J.P. Morgan AMC virtual experience program: KPI, advisory and economic outlookPGIM Fixed Income: Credit research, Risk management, Credit reviewImpact of group dynamics with reference to Angel one			2023 2023 2022
Projects	<ul style="list-style-type: none">Portfolio management of a risk averse client with an overall return of 17.70%Derivatives project on Delta, Theta, Gamma, and Vega's mathematical impactDerivatives case study on collapse of Bearings bank and Franklin Templeton mutual fundQuantitative Finance: 6.80% PFCL Bond Calculation of Z-spread, YTM, DurationFinancial market of Japan with respect to Bonds, Derivatives, Stock and Banking System			2023 2023 2023 2023 2022
Certifications	<ul style="list-style-type: none">NISM Series V A: Mutual fund Distributors CertificationBloomberg Market Concept (BMC)-Detail study of various financial areas such as economic indicators, Currencies, Fixed income, and Equities along with Bloomberg terminal functionsAdvance Excel - Financial formulas, VBA macros and Dynamic lookupsFinancial Modelling on market trends, management comments, consumer behaviourCertified in Tally with GST for filling of input-output tax, cost center and inventory recordEnhancing the codes of Python for presenting and simplifying the Bulk data			2023 2022 2022 2022 2019 2024
POSITIONS OF RESPONSIBILITY				
Coordinator Goonj Magazine	<ul style="list-style-type: none">Publishing the magazine with featuring important events and article of InstituteResponsible for editorial of magazine and coordinating with different committees			2024
Event Head at E-cell	<ul style="list-style-type: none">Coordinating with committee for organizing Entrepreneur-Students meetDelivered engaging anchoring for a Jugaadu event in front of 350 attendees			2024
TED x	<ul style="list-style-type: none">Responsible for acquiring the valuable deals from sponsorsSecurity and discipline at TEDx event as per the guidelines			2019
EXTRA CURRICULAR ACHIEVEMENTS				
Logo Art Karate	<ul style="list-style-type: none">Awarded a Gold medal in logo Designing competition by Hinduja CollegeAchieved Orange belt in Judo Karate			2020 2014