

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 yield Managed product development for algo trading, optimizing and eliminating manual intervention Worked with fund manager for asset allocation for fixed income, arbitrage, equities, and IPOs Updated fund performance reports for the marketing team to analyze and compare returns Conducted back testing for economic events, providing data-driven insights for investment strategies Automated 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 service Lead transfer for Cross sell of insurance products such as ULIP, Health and Term insurance Recognition 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 analysis Prepared 13 Q4 Equity Research reports, database for Financial Modelling and updating the financials Assisted 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 Competition Top 5 National Finalist for Acquisitions Competition with reasoning and financials conducted by NIBM, Pune 1st Runner Up for Business plan competition at ICFAI, Hyderabad Top 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 outlook PGIM Fixed Income: Credit research, Risk management, Credit review Impact 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 impact Derivatives case study on collapse of Bearings bank and Franklin Templeton mutual fund Quantitative Finance: 6.80% PFCL Bond Calculation of Z-spread, YTM, Duration Financial market of Japan with respect to Bonds, Derivatives, Stock and Banking System 					
					2023	
					2023	
					2023	
					2023	
Certifications	<ul style="list-style-type: none"> NISM Series V A: Mutual fund Distributors Certification Bloomberg Market Concept (BMC)-Detail study of various financial areas such as economic indicators, Currencies, Fixed income, and Equities along with Bloomberg terminal functions Advance Excel - Financial formulas, VBA macros and Dynamic lookups Financial Modelling on market trends, management comments, consumer behaviour Certified in Tally with GST for filling of input-output tax, cost center and inventory record Enhancing the codes of Python for presenting and simplifying the Bulk data 				2024	
					2023	
					2022	
					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 Institute Responsible 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 meet Delivered 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 sponsors Security 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 College Achieved Orange belt in Judo Karate 					
	2020					
	2014					