

Harshal M Kalra

FINANCE STUDENT | CFA ASPIRANT

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EDUCATION

2023-2026

**MOUNT CARMEL COLLEGE,
AUTONOMOUS**

Bachelor of Business
Administration (83.53%)

2021-2023

**SRI KUMARAN'S CHILDREN'S
HOME - CBSE**

Commerce with
Entrepreneurship (92.2%)

SKILLS

- MS Excel
- MS Powerpoint
- Strategic Planning
- Data and Reporting
- Financial Data Analysis
- Regulatory Reporting
- Time Management

ACADEMIC EXPOSURE

- Trade Finance
- Cash Treasury operations
- Basic Introduction to Python
- Basic Quantitative Analysis

PROFILE

Final-year BBA Finance student with a strong understanding of capital markets and operational processes. Skilled in reconciliation, compliance monitoring, and data reporting using Excel and Power BI. Eager to apply analytical skills and attention to detail to support Morgan Stanley's Operations division while building teamwork and professional experience.

CERTIFICATIONS

- Investment Banking.
- An Introduction to Power BI.
- Microsoft Excel Advanced: for Professionals and Corporates.
- Project Management: Agile and Traditional methods.
- Pitchbook: Pitch Deck for Investor Pitching.
- Certificate Program in Capital Markets.
- Financial Literacy.
- Participated in EY CAFTA (Treasury).
- Data Analysis Masterclass Using Spreadsheet, MS excel and Tableau (In progress.)

COLLEGIATE EXTRACURRICULARS

- 1 year as a core team member of Sales department with the Mount Carmel Centre for Innovation, Incubation and Entrepreneurship (MCCIE).
- 1 year as a core team member of Registrations team of the Student Council.

INTERNSHIP EXPERIENCE

- The Collectiv Community Lead -
Content & Strategy** SEPT'23-FEB'24
 - Supervised a team of 7 creators, ensuring process adherence and timely delivery in line with organizational and regulatory standards.
 - Maintained regular smooth communication with stakeholders to report anomalies, escalate risks, and enrich transparency.
 - Enhanced transparency and accuracy through regular performance reviews and control documentation.
- The Collectiv Social Media
Marketing Intern** MAR'23-AUG'23
 - Conducted data analysis of client performance metrics, ensuring accuracy and alignment with compliance standards and supported regulatory reporting tasks.
 - Developed Excel dashboards for intra-day and end-of-day monitoring of reconciliation checkpoints, improving process efficiency and participated in KPI tracking.
 - Evaluated operational workflows, recommending risk-control improvements to reduce inefficiencies.
 - Conducted data reconciliation and KPI tracking for compliance and risk reporting. This helped hone my attention to detail.
 - Streamlined data entry and reconciliation processes, reducing manual effort through formulas.
 - Demonstrated ownership, accountability, and collaboration with cross-functional teams.