



Piyanshu Bansal
Investment Banking
Enthusiast

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Date of birth 05/04/2001
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As a PGDM Finance student at ISBR Business School, I am simultaneously building expertise in Advanced Valuation, Financial Modeling, and Advanced Excel, with a strong emphasis on finance and investment banking. Eager to apply my skills in a practical internship to support financial decision-making and gain valuable industry experience.

WORK EXPERIENCE

- Accounts TraineeFrom March 2024 to June 2024 ()
Ashish K Kumar & Associates Barnala, PB, India
 - Objective:** Sought practical exposure to accounting principles and tax regulations to deepen understanding of financial management.
 - Key Responsibilities:** Managed client accounts, prepared balance sheets, filed income tax and GST returns, and learned basics of TDS and TCS.
 - Outcome:** Strengthened accounting skills and gained experience with tax filing, contributing to a solid foundation in financial compliance and reporting.
- Office AdministratorFrom April 2022 to June 2023 ()
Omega Study Centre Barnala, PB, India
 - Objective:** Gained foundational knowledge in business administration and market research, aiming to develop a strong grounding in core business functions.
 - Key Responsibilities:** Conducted market research, managed basic administrative duties, organized staff meetings, and updated calendars.
 - Outcome:** Enhanced understanding of business operations and gained practical experience in organizational and communication skills essential for effective administration.

CERTIFICATIONS

- Forage – Investment BankingJanuary 2025
JP Morgan Chase Virtual Experience
 - Objective:** Gain hands-on IB experience, especially in valuation.
 - Tasks:** Performed DCF analysis, worked on M&A deals, and created client presentations.
 - Key Learnings:** Strong grasp of company valuation, deal execution, and financial statement analysis.
- Certified Investor AwarenessJanuary 2025
NISM SEBI
 - Objective:** Gain knowledge of stock markets, regulations, and investments.
 - Tasks:** Learned about SEBI rules, mutual funds, and risk management.
 - Key Learnings:** Awareness of market regulations, investment instruments, and compliance—crucial for IB transactions.
- Data Science & AnalyticsDecember 2024
HP LIFE Online
 - Objective:** Use data analysis for better decision-making.
 - Tasks:** Worked on data visualization, predictive modelling, and Excel/Python analytics.
 - Key Learnings:** Ability to analyse financial data, create reports, and forecast trends, useful in financial modelling.
- Forage – Investment BankingNovember 2024
Citi Bank Virtual Experience
 - Objective:** Learn financial modelling, valuation, and deal structuring.
 - Tasks:** Conducted DCF and comparable company analysis, created pitchbooks, and analysed financial statements.
 - Key Learnings:** Strong foundation in M&A, valuation, and financial analysis; improved Excel and PowerPoint skills.
- Bloomberg Market Concepts (BMC)November 2024
ISBR BUSINESS SCHOOL Bangalore, KA, India
 - Objective:** Understand financial markets and use Bloomberg Terminal.
 - Tasks:** Studied economic indicators, equities, bonds, and currencies; analysed market trends using Bloomberg tools.
 - Key Learnings:** Ability to track market movements, interpret economic data, and analyse financial instruments.

TECHNICAL SKILLS

MS OFFICE

Objective:

To apply the advanced skills I'm currently mastering in advanced valuation, financial modeling, pitch book preparation, and Excel functions, along with proficiency in Word and PowerPoint, in an internship or role focused on financial analysis, reporting, and strategic decision-making.

Key Learning:

- On track to mastering advanced valuation techniques for accurate financial assessments and projections.
- Actively learning pitch book preparation as part of advanced valuation and financial modeling.
- Developing expertise in creating complex financial models and forecasts using advanced Excel functions.
- Gaining proficiency in pivot tables and advanced Excel features for detailed data analysis.
- Strengthening presentation skills in PowerPoint to effectively communicate financial insights.
- Progressing in Word documentation skills for producing professional and clear financial reports.

EDUCATION

PGDM (Finance)	Since 2024
ISBR BUSINESS SCHOOL Bangalore, KA, India	
Bachelor of Commerce (B.COM)	From 2020 to 2023
Punjabi University Patiala, PB, India	
Senior Secondary Education	From 2018 to 2019
Mother Teacher Preparatory School Barnala, PB, India	

SOFT SKILLS

Interpersonal Ability

Building and maintaining positive relationships with others.

Emotional Intelligence

Being aware of and managing your emotions, understanding others' emotions, and showing empathy.

Work Ethic

Showing dedication, responsibility, and integrity in one's work.

VOLUNTARY EXPERIENCE

PLACEMENT AMBASSADOR	Since October 2024
ISBR BUSINESS SCHOOL Bangalore, KA, India	
Coordinated communication between students and recruiters, ensuring smooth processes.	
Supported the placement team in maintaining corporate relationships and promoting career development initiatives.	