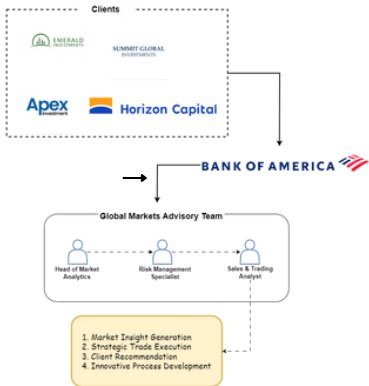





Bank of America - Global Market & Sales | Business Case Study

Business Workflow






Market Insights for Growth & Stability.

- **What was the Business goal?** → Strengthen long-term growth while managing short-term volatility
- **What I did** → Trend analysis, goal alignment, structured reporting
- **What was the result?** →  10% allocation to Energy  Increased Healthcare by 5%  Secured cash reserves

Adapting to Market Shifts

- **What was the Business goal?** → Balance short-term agility with long-term stability.
- **What I did** → Key metric analysis, simulated feedback, refined strategies
- **What was the result?** →  5% more in Renewable Energy  5% less in Technology  Stable Real Estate  5% cash reserved

Client-centric Product Selection

- **What was the Business goal?** → Focus on sustainability, diversification & growth
- **What I did** → Summarizing priorities, justifying selections, actionable recommendations
- **What was the result?** →  10% in Green ETFs  8% in high-emerging bonds  Increased exposure to eco-friendly sectors

Automating Processes for Efficiency

- **What was the Business goal?** → Optimize trade execution & data handling
- **What I did** → Identifying inefficiencies, proposing solutions, structured implementation
- **What was the result?** →  5% more in Renewable Energy  5% less in Technology  Stable Real Estate  5% cash reserved

Key Takeaways + Value to Business

What I learned:

- Grasped macroeconomic trends and how markets adapt
- Practiced cross-functional thinking: tech + trading + client needs
- Created scalable solutions that aligned with business goals

If I were hired:

- Develop a fast, data-driven client insights dashboard
- Streamline internal analyst workflows using automation
- Collaborate with Sales to refine product mapping based on client data
- That will keep things sharp, clear, and results-oriented

Tools:

- Python (EDA + in-depth analysis)
- Excel (file handling)
- Bloomberg Terminal (market analysis) ***not used**
- Draw.io (diagrams)
- Github