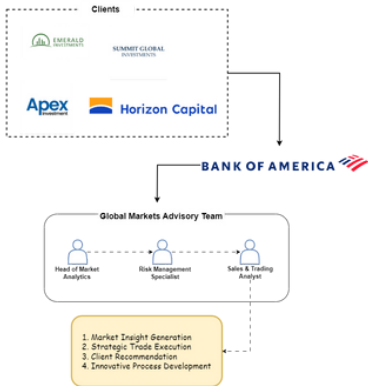


Business Workflow



Market Overview & Insight Generation

Business goal:

- Analyze client portfolio and provide insights that facilitate **long-term growth** as well as **mitigate short-term volatility**

Outcome:

- **10%** of cash reserve allocated to **Energy** sector
- Increased **Healthcare** allocation by **5%** achieved stability
- **Secured cash reserves** for future market opportunities.

What I did:

- **Identified trends & recognized patterns** in the data
- **Aligned insights** with client's goals
- **Structure findings** in a report

Navigating Live Market Dynamics

Business goal:

- Achieve **short-term agility** to **capitalize on market shifts** as well as **moderate long-term growth** with **reduced volatility**

Outcome:

- **5%** increase in **Renewable Energy** allocation.
- Reduced **Technology** allocation by **5%**.
- **Real Estate** was **unchanged**
- Retain **5%** cash reserves for future market opportunities.

What I did:

- **Analyzed** key metrics & **structured** recommendations.
- **Aligned** with client's objectives
- **Simulate** feedback
- **Refine** the response

Client-centric Product Recommendations

Business goal:

- Prioritize **focus on sustainability, portfolio diversification & moderate growth**

Outcome:

- **Green ETFs** get **10%** allocation for sustainability
- **8%** allocation to high-emerging bonds for **diversification** along with **moderate growth**
- Increased exposure to high-growth, **environment-friendly sectors**

What I did:

- **Summarized** client priorities.
- **Justified** product selections & **proposed** actionable steps
- **Summarized** expected outcomes

Automation & Process Analysis

Business goal:

- **Optimize** trade-execution process, manage **manual reconciliation & data handling** that facilitates **high-growth**

Outcome:

- **5%** increase in **Renewable Energy** allocation.
- Reduced **Technology** allocation by **5%**.
- **Real Estate** was **unchanged**
- Retain **5%** cash reserves for future market opportunities.

What I did:

- **Summarized** the identified issue
- **Proposed & justified** the solution.
- **Formed** plan implementation & expected outcome

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