

Bilal Rasheed

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PROFILE

A dynamic and driven finance professional with two years of experience in the financial services industry. Adept in accounting and finance, recently completed an MSc in Financial Data Science from University College Dublin – Smurfit Business School, and currently preparing for CFA Level 3. Proven critical thinker with a strong foundation in accounting, portfolio management, equities, risk management, and fund services. Seeking to leverage my skills and expertise to contribute to a forward-thinking financial institution.

EDUCATION

MSc Financial Data Science, UCD Smurfit Graduate Business School, Ireland 2023 - 2024

- Key modules: Financial Analysis, Python for Finance, Treasury Management, Structured Finance, Machine Learning for Finance, Portfolio & Risk Management, Banking and Finance

CFA Level 2 (Cleared), CFA Institute, United States of America 2021 - 2024

- Key modules: Financial Reporting, Portfolio Management, Fixed Income, Equity Valuation, Quantitative Methods

BSc Accounting and Finance, Institute of Business Administration (IBA), Pakistan 2017 - 2021

- Key modules: Financial Accounting, Financial Reporting, Corporate Finance, Financial Modelling, Financial Management, Statistical Inferences, Management Accounting, Auditing, Taxation

CAREER EXPERIENCE

Associate (Portfolio Management), Magnus Investments Limited, Pakistan Feb 22 - Jul 23

Magnus is a boutique investment advisory firm and a leader in managing portfolio of retirement funds in Pakistan.

- Managed Defined Contributions (DC) and Defined Benefit (DB) funds for various institutional clients
- Calculated NAV, prepared client reports, monitored cash flow and strengthened client relationships
- Rebalanced client portfolios and prepared investment recommendations in compliance with the IPS

Project Trainee, Meezan Bank Limited, Pakistan Jan 21 - Jul 21

- Researched foreign institutions and innovative technologies to develop digital banking strategies

Finance Intern, Lucky Cement Limited, Pakistan Sep 20 – Oct 20

- Conducted analysis & research for various assignments required by the CFO
- Managed logistics for board meetings and organized shareholder information

SKILLS AND CERTIFICATIONS

- **IT Skills:** Python, Bloomberg, Advanced Microsoft Office (Excel, Word, PowerPoint)
- **Certificates:** ACCA Exemptions 6/13, CFA Investment Foundations®, Excel Skills for Business: Essentials

PROJECTS

- **Financial Analysis:** Conducted DCF valuation on Domino's Pizza (DPZ) using financial data from Bloomberg
- **Python for Finance:** Utilized Numpy, Pandas, and Yfinance libraries to gather, analyze and visualize financial data
- **Financial Data Science:** Analyzed Premier League data for predictive modeling and developing betting strategies
- **Treasury Management:** Assessed Elon Musk's acquisition of Twitter using various valuation models
- **Structured Finance:** Provided economic outlook on the CLO, ABS, RMBS and other structured finance products

EXTRA CURRICULAR

Event Steward, Eventsec May 24 - Sep 24

- Assisted in event operations, ensuring guest satisfaction and smooth execution of event logistics

Retail Assistant, Sports Direct Sep 23 - Jan 24

- Worked in pressured environment during rush hour and increased customer satisfaction

Peer and Private Tutoring Jun 18 – Feb 22

- Mentored and taught Mathematics to 200+ O-levels students at Reads School (Pakistan)