



Flat No.302, Plot No. 160/161, Goregaon Sahakar Niwas CHS, Road No.2, Jawahar Nagar, Goregaon West, Mumbai-400104.

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LinkedIn Profile: [Moksh Shah](#) | [LinkedIn](#)

Career Objective: Eager to begin my career at the intersection of finance, equity research, and client relationship management, where I can combine analytical insight with practical business understanding. With a foundation in financial management, tax planning, and market knowledge, I seek to contribute meaningfully to organizational growth while sharpening my problem-solving and decision-making skills to build a strong and versatile career in the finance industry.

Education:

Post Graduate Diploma in Management (2024-26 Batch) - Pursuing
MKES Institute of Management Studies & Research

Specialisation: Finance

AICTE Approved 2-year Full Time programme

Bachelor of Commerce - CGPA: 7.66 CGPA

L.S Raheja College of Arts and Commerce, Mumbai (May 2022)

- **Relevant Coursework:** Financial Management, Taxation, Marketing, Computer Application, Strategic Management.

Higher Secondary Education (12th) - Percentage: 76.77%

L.S Raheja College of Arts and Commerce, Mumbai (May 2019)

Secondary School Education (10th) - Percentage: 70.17%

Goregaon Education Society's English Medium School, Mumbai (May 2017)

Skills:

- **Technical Skills:**

Microsoft Office: Word, PowerPoint, Excel (Advance Functions, data analysis)

Data Visualization & BI Tools: Power BI, Tableau

Tally Prime

- **Soft Skills:**

Communication

Situation Analysis

Adaptability

Flexibility

- **Languages:** English, Hindi, Gujarati.

Summer Internship Programme

Internship Company: Investmind Financial Services

Period: 2 months

Role: Associate

Work Done

- Performed equity research on listed companies and sectors.
- Analysed and understood mutual fund products and strategies.
- Assisted in customer relationship management (CRM) activities.
- Studied and evaluated insurance products.

Key Learnings / Experience Gained

- Gained exposure to **fund management process** and mutual fund operations.
- Acquired **technical and analytical knowledge** of financial markets.
- Built awareness of **current market affairs** impacting investments.
- Developed understanding of the **insurance industry and its offerings**.
- Observed **consumer behaviour and mindset** towards mutual funds and insurance.
- Learned the **end-to-end client onboarding process** in financial services.

Certifications:

1. NISM VA- Mutual Fund Distributors
2. NISM VIII- Equity Derivatives
3. NISM XXIA- Portfolio Management Services (PMS) Distributors
4. Investment Banking, Asset Management, Inventory Management from Great Learning.
5. Harvard Business Publishing Certification in Finance, Management Communication and Quantitative Methods.
6. Smart Sustainability and Innovation by Rochester Institute of Technology, Dubai.

Academic Projects:

S.H.A.R.E.

Shree Vivekanand Research and Training Institute, Mandvi, Gujarat.

November – December 2024

Multi-project Management Information System (MIS)

Extracurricular Activities:

- Volunteer at Sadhana Education Society's L.S. Raheja College of Arts and Commerce, contributed to the Economic Empowerment Conference in October 2019.
- Management Premiere League (MPL):
Participated and part of the winning team in a competitive event involving a management game, CSR activities, and a team-based skit, demonstrating teamwork, problem-solving, and organizational skills.
- Participated in a College Annual Event, where gaining hands-on exposure to trading strategies and real-time decision-making.
- Hobbies: Reading Books, Financial Journals, Magazines, newspapers, travelling.