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LinkedIn Profile: [Pratham Makwana](#) | [LinkedIn](#)

Career Objective: Driven and analytical finance professional with a Bachelor's degree in Management Studies (specializing in Finance) and a passion for leveraging financial acumen to deliver innovative solutions. Aspiring to contribute to organizational success by applying expertise in corporate finance, investment analysis, and financial management. Committed to continuous learning and professional growth, with a long-term goal in achieving financial independence.

Personal Goal: My long-term goal is to specialize in finance and to leverage my expertise to drive impactful financial decisions. I am dedicated to gaining in-depth knowledge to achieve professional excellence and financial independence.

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

Bachelors in Management Studies - CGPA: 7.82 CGPA

Nirmala memorial foundation college of arts and science, Mumbai passing in (May 2023)

- **Relevant Coursework:** Financial Accounting, Direct Tax, International Finance, Strategic Financial Management

Higher Secondary Education (12th) - Percentage: 63.68%

KES shroff college, Mumbai passed in (Feb 2020)

Secondary School Education (10th) - Percentage: 72.40%

St George High School, Mumbai passed in (May 2018)

Skills:

- **Technical Skills:**
 - MS Office and Advanced Excel
 - Financial Analysis
 - Knowledge of financial markets
 - Creating budgeting and forecasting
- **Soft Skills:**
 - Attention to detail
 - Time management
 - Communication and team collaboration
 - Problem solving

- **Languages:**
 - English
 - Hindi
 - Gujarati

Summer Internship

- **Organization:** Bondbazaar Securities Pvt. Ltd.
- **Role:** Summer Intern – Finance
- **Duration:** 8 weeks (May–July 2025)
- **Project Title:** Exploring Retail Bond Investment Dynamics in India: A Study of Client Engagement, Fixed-Income Strategies, and Market Practices
- **Key Responsibilities & Achievements:**
 - Streamlined **digital KYC, client onboarding, and Demat account activation**, improving process efficiency and completion rates.
 - Conducted **investor profiling and risk segmentation**, recommending suitable fixed-income products aligned with client goals and risk appetite.
 - Performed **credit risk and financial analysis** of NBFCs (e.g., IIFL Finance), identifying regulatory red flags and evaluating debt instrument viability.
 - Expanded distribution outreach by **engaging 50+ Mutual Fund Distributors (MFDs)** through structured partnership pitches and cold calling.
 - Enhanced **CRM data accuracy and client communication**, leading to improved investor engagement and higher conversion rates.
 - Participated in **live bond trading and investor awareness campaigns**, gaining hands-on exposure to valuation, yield analysis, and portfolio diversification.

Academic Projects:

Live Project: - Portfolio Diversification & Asset Allocation

1st January, 2025 to 5th March 2025

Research & building of diversified portfolio from different asset class (Nifty 500, Gold, Government securities, Real Estate & Fixed Deposits) Analyzing the risk and returns for 1 year, 5 year & 10 year of time period.

S.H.A.R.E | Socially Aware Humanitarian Action for Responsible Enterprise

Social Impact Project | ML Dhawale Trust A, Palghar, Maharashtra

25th November, 2024 to 7th December, 2024

- Analyzed and identified inefficiencies in existing stock management practices.
- Differentiated inventory types (internal and external medicines) for better categorization.
- Designed and tested a hybrid system combining manual and digital tools for efficient stock tracking, improving stock management efficiency.
- Installed the system on hospital PCs, providing real-time stock visibility to backend staff.
- Conducted training sessions for 50+ nurses and administrative staff, ensuring effective adoption of the new system.
- Collaborated with team members to optimize workflows, resulting in improved inventory accuracy and reduced stock discrepancies.

A study on Ombudsman | Black book project

Nirmala memorial foundation college, A.Y. 2023

- Researched and analysed the functions and impact of Ombudsman systems
- Reviewed legal frameworks and case studies to understand their effectiveness
- Prepared a detailed report and presented findings to faculty and peers

Achievements:

- Secured 1st position in the Management Premier League (M.P.L) at MKES IMSR as the captain of the winning team, demonstrating leadership and strategic thinking.
- Completed Finance Certification from Harvard University, enhancing expertise in investment strategies and risk management.

Extracurricular Activities:

- Volunteer at Robinhood Army: Conducted education sessions for underprivileged students, enhancing leadership and teaching skills.
- Organized and managed intercollegiate events, including Job fairs and Cricket tournaments, showcasing organizational and teamwork abilities.
- Hobbies: Cricket, Travelling, Drawing