

PREETI HOODA

MUMBAI

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A commerce graduate with a post graduation in finance with prime focus on analysis and research work. Around 2.2 years of experience in portfolio and fund analysis and market research. I'm a self-motivated with sound communication and analytical skills.

WORK EXPERIENCE

FINANCE INTERN

BAJAJ FINANCE PVT. LTD. - PUNE - 2016-05 - 2016-06

was responsible for analysing the application forms of various customers.
understanding the working of various proprietary models and how they are useful.
understand various kinds of policies available and factors considered for each policy,
Understand the financial working behind every policy and how premiums are calculated.

WEALTH ANALYST

AKT BUSINESS SERVICES PVT. LTD. - MUMBAI - 2013-05 - 2015-07

- Create various reports using the data available from client allocation reports and Morningstar.
- Closely monitor the funds in approved investment fund list. Due diligence of approved funds. Analyze the assigned asset class funds monthly and bring to the notice unusual figures.
- Support new fund research.
- Use Morningstar Direct for analysis of funds and maintaining model portfolios.
- Analysis of individual accounts asset allocation.
- Update various reports on fund data and economic data with help of Morningstar.
- Develop Excel templates to make the processes more efficient.
- Cross training. Identify areas of development and recommend on training needs.
- Analyze hedge fund reports to process and upload data using different proprietary MS Excel models
- Troubleshoot errors on the models and database, as and when required
- Data reconciliation, verification and audit, if required
- Follow proprietary processes diligently and maintain the quality and turnaround requirements
- Understand and execute other sub-processes to ensure scalability across the division
- Communicate with the client teams through emails and frequent telephonic calls for any data discrepancies or process deviations

EDUCATION

M.B.A in FINANCE

SINHGAD INSTITUTE OF BUSINESS ADMINISTRATION AND RESEARCH - PUNE
2015-07 - 2017-05

B.M.S in FINANCE

K.P.B HINDUJA COLLEGE OF COMMERCE - MUMBAI
2010-08 - 2013-05

HSC in COMMERCE

NAVY CHILDREN SCHOOL - KOCHI

2008-04 - 2010-04

SKILLS

MICROSOFT OFFICE, BLOOMBERG, MORNINGSTAR SOFTWARE, COMMUNICATION SKILLS, INTER-PERSONAL SKILLS

LINKS

[https://www.linkedin.com/in/preeti-hooda-31693849/treasury/summary/?entityUrn=urn%3Ali%3Afs_treasuryMedia%3A\(ACoAAApIZsIBXiiv05GARUzWISwDAdsss61bZts%2C1492707642977\)](https://www.linkedin.com/in/preeti-hooda-31693849/treasury/summary/?entityUrn=urn%3Ali%3Afs_treasuryMedia%3A(ACoAAApIZsIBXiiv05GARUzWISwDAdsss61bZts%2C1492707642977))

AWARDS

Outstanding Performer

2015-08

Awarded as Outstanding performer for excellent performance during 3 day competition organised for first year students of M.B.A by SIBAR, Pune. This 3 day event included various management games and competition to analyse the students interests and strength by their respective mentors

Best Team

2016-02

An marketing event organised in campus which gives an opportunity for teams to show their marketing skills. Each team has to put up a stall and sell some product and earn the highest profit. My team of 6 won the Best Team award for team spirit and coordinated effort for putting up an eatery stall. The menu and idea was loved by everybody visiting the campus.

Certificate of Merit

2013-01

Awarded Certificate of Merit for securing the highest marks in Statistics subject in F.Y.B.M.S at K.P.B Hinduja College of Commerce.

Winner of Football Championship

2005

Member of under-14 and under-16 girls football team of Navy Children School and stood first and runners-up in the year 2004 and 2005 respectively In Inter School Tournament organized by Mumbai School Sports Association (MSSA).

CERTIFICATIONS/LICENSES

Mutual Fund Distributors Certificate

2013-07 - 2016-06

Certificate issues by National Institute of Securities Markets (NISM).

- Know the basics of mutual funds, their role and structure, different kinds of mutual fund schemes and their features
- Understand how mutual funds are distributed in the market-place, how schemes are to be evaluated, and how suitable products and services can be recommended to investors and prospective investors in the market.
- Get oriented to the legalities, accounting, valuation and taxation aspects underlying mutual funds and their distribution.

•Get acquainted with financial planning as an approach to investing in mutual funds, as an aid for mutual fund distributors to develop long term relationships with their clients

TALLY 9 ACCOUNTING CERTIFICATE

2011-01 - Present

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Our Products

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woodpecker

spi-cinemas-pvt-ltd

suresh-press-works

kamal-agarwal

anandbarpute

bhagal

woodpecker

Tally.ERP 9
SHOPER 9
Tally.SERVER 9
Tally.DEVELOPER 9

Tally.ERP 9 - Integrated business management

Tally.ERP 9 is a comprehensive business management software that is extremely simple to use. It is packed with all the features that map your business operations yet is very easy to learn. With blazing speed, you get access to all your business reports in no time and you can rest assured that all your business data is highly safe and secure.

Maharashtra State Certificate in Information Technology

2011-02 - Present

Computer Basics

Operating System (Windows 7)

21st Century Life Skill

21st Century Citizenship Skill

21st Century Study Skill

21st Century Job Skill

Word Processing (Microsoft Word 2013)

Spreadsheet (Microsoft Excel 2013)

Presentation Graphics (Microsoft PowerPoint 2013)

Personal Information Manager (Microsoft Outlook 2013)

Typing Test

Computer Ethics, Privacy and Security