

# Pooja Haria

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Looking for a career move within an Equity Research role in a meaningful and challenging position that enables scope for advancement as a professional, thereby ensuring growth of the organization.

## WORK EXPERIENCE

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### **Data Research Analyst | Morningstar Inc – Equity Global Fundamentals | November 2021 – October 2023**

Navi Mumbai

- Conducting fundamental analysis (including computation of ratios, variance analysis, analysing trends in revenue, cash flows, EBITDA) of listed entities.
- Aggregation of financial data sourced from financial sector publications, press releases, and updates from SEBI.
- Gathering and consolidating financial data from multiple publicly traded entities, and subsequently integrating it into internal systems for dissemination across various organizational units.
- Recommending innovative ideas and testing new product enhancement for Systems used by the Equity Department, conducting post-implementation audits, offering feedback for further improvement, and creating SOPs.
- Mentored 40 newly onboarded employees on end-to-end processes and conducting audits of their assignments.
- Responsible for ensuring and improving the performance, productivity, efficiency, and delivery of the operational KPIs.

### **Officer Trainee | Stockholding Corporation of India | March 2020 – December 2020**

Mumbai

- Demat account opening, facilitating investments in Sovereign Gold Bonds, RBI Bonds, Primary & Secondary Bond Market Guidance.
- Facilitating trading instructions.
- Providing research reports and daily market updates to clients.
- Soliciting clients for sale of Insurance products, term deposits, NPS schemes and more.

## EDUCATION

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### **Global Financial Markets Professional (GFMP) – PG Diploma in Finance | Institute of Bombay Stock Exchange**

University of Mumbai – (May'2019 – June'2020)

### **Bachelor of Commerce | K. J. Somaiya College of Arts, Commerce and Science**

University of Mumbai – CGPA 6.38, Final Grade – A (June'2015 – March'2018)

### **NISM Exams & Workshops**

Series VIII - Equity Derivatives

Series V A - Mutual Fund

Series VII - Securities Operations and Risk Management

Financial Modelling Workshop Conducted by Skill Nation

## ACHIEVEMENTS

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Morningstar - Newbie of the Quarter Award

Morningstar - Star of the Quarter Award

Thank You Cards for Best Quality Productions

Spot Awards for Innovative Ideas

## SKILLS & INTERESTS

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Working knowledge of MS Word, Excel, and PowerPoint

Working knowledge of SQL

Investing in stock markets and analyzing charts for stock price movements

Music, Reading, Writing, Travel

## LANGUAGES

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English, Hindi, Gujarati, Marathi.