

Maitri Maniar

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| ACADEMICS | | | | |
|--|--|-------------------------|-------------------------------|---------|
| Qualification | Institute | Board/University | Year | %/CGPA |
| MBA | NMIMS | NMIMS | 2024 | 2.82/4 |
| BMS | Kapol College | Mumbai University | 2021 | 8.32/10 |
| XII | Vidyaniketan College | Maharashtra State Board | 2018 | 72.77% |
| X | St. Xavier's High School | CBSE | 2016 | 9.6/10 |
| Professional Certifications | NISM-Series-XV: Research Analyst Certification Examination | | | 2024 |
| | IC-38 IRDAI Certification Examination | | | 2022 |
| Skills | Corporate Finance, Financial Statement Analysis, Valuation, Risk Management, Derivatives, Financial Modeling, Wealth Management, Investment Banking, Computerized Accounting, Tableau, Excel | | | |
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| WORK EXPERIENCE | | | | |
| Strategic Alliances & Partnership Manager Liquiloans | | | Apr'24-Current (04 Months) | |
| <ul style="list-style-type: none">• Structuring NCDs/ICDs calculations for HNI clients as per their investment requirements and risk analysis• Carried out ratio analysis to compare liquidity and keep NPA under control• Raising 2+ cr of gross investments on M-O-M basis in P2P product and NCDs/ICDs; conversion ratio of 20% to become monthly active investors and growth of monthly investments by 10%• Onboarded 70+ B2B Financial Distributors for sourcing investments and driving revenue for the company | | | | |
| Junior Accountant Kant Polymers | | | Apr'21-Dec'21 (08 Months) | |
| <ul style="list-style-type: none">• Prepared detailed annual financial statements and comprehensive reports outlining the company's financial performance• Recorded routine journal entries accurately and efficiently within the designated accounting system for effortless tracking• Maintained account receivables and payables to ensure proper financial reporting and systematic management of transactions | | | | |
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| INTERNSHIPS | | | | |
| Research Analyst Nifty Only | | | Dec'23– Feb'24 (03 Months) | |
| <ul style="list-style-type: none">• Conducted research on publicly traded companies' financials and industry trends to support financial decisions• Analyzed market data to identify stock performance and assess companies' financial health• Regularly tracked industry as well as company developments and performed financial models to back research reports• Drafted research reports that summarize findings and recommendations for potential investment opportunities• Constantly communicated with stakeholders and clients to discuss research findings and recommendations | | | | |
| Financial Analyst Fieldmobi | | | Apr'23– Jun'23 (04 Months) | |
| <ul style="list-style-type: none">• Performed financial modeling with the primary focus on revenue forecasting and cost budgeting• Functioned directly with the founder while coordinating with tech team on designing a financial management system• Responsible for reconciling expenses and overseeing financial data to ensure accuracy and compliance• Conducted cost benefit analysis and competition analysis to identify any potential risks, benefits and assess its feasibility• Contacted 20+venture capital firms, presenting customized pitch deck to engage potential investors for the company | | | | |
| Financial Analyst Fundsroom | | | Feb'23 - Mar '23 (1.5 Months) | |
| <ul style="list-style-type: none">• Lead generation and conversion for Demat account openings, securing 10+ new accounts followed by trading on them• Client Education on basic investment techniques, Fundamental and Technical analysis, Portfolio creation and financial literacy• Successfully completed training modules in client portfolio creation using Tableau and developed customized Tableau dashboards and comprehensive financial reports for client portfolios to facilitate visually appealing decision-making process | | | | |
| Insurance Advisor Bajaj Allianz | | | Jan'22-Feb'22 (02 Months) | |
| <ul style="list-style-type: none">• Acquired in-depth knowledge of insurance policies and performed policy analysis to align company's offerings with each policy• Assisted clients in the claims process, guiding through documentation, and advocating for fair and timely claim settlements• Assessed clients' insurance needs based on their financial situation, lifestyle, risk tolerance and conducted risk assessments to determine potential liabilities providing appropriate insurance solutions to mitigate risks | | | | |

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| Administrative Assistant Genius Kid | | Jun'19-Nov'19 (06 Months) |
| <ul style="list-style-type: none"> • Coached aspiring candidates & mentors to enhance students' problem-solving abilities for international math championships • Organized, led & managed regular monthly workshops for franchisee directors and staffs to improve institute's performance • Successfully managed and resolved operational challenges for multiple franchises at head office administration level | | |
| VOLUNTEERING | | |
| Intern Make a Difference NGO | | Feb'23 (21 Days) |
| <ul style="list-style-type: none"> • Identified the organization's requirement for a project management system, researched and evaluated different applications, and recommended an application that is the best fit for the organization • Created and delivered presentations that outlines the organization's goals and future plans to fundraisers and volunteers • Managed their banking transactions and helped them with the execution of 5+ investment opportunities | | |
| Media Head The Public Relations Committee (NMIMS) | | Mar'23-Mar'24 (12 Months) |
| <ul style="list-style-type: none"> • Collaborated with media agencies to devise strategic media plan for promoting the college, significantly enhancing the college's online presence, resulting in an increase of over 100% in engagement and approximately 40% growth in followers • Accountable for financial planning and procedures like reimbursement, maintaining cash flow records and other expenses | | |
| CO-CURRICULAR AND EXTRA-CURRICULAR ACTIVITIES | | |
| Certifications | • Bloomberg Market Concepts | 2023 |
| | • Coursera Project: DCF Modeling , Stock Valuation with DDM and with Comparable Companies , Introduction to Valuation with WACC | 2023 |
| | • Financial Analyst Certification; Finance Advance Live Pre-Graduation Program | 2023 |
| | • BFSI course; UNNAT Kotak Education Foundation | 2021 |
| | • Computerized Accounting course; Institute of Information and Computer Technology AGCSM | 2021 |
| Extracurricular Activities | • 2nd position in World Mental Calculation Olympics | 2016 |
| | • 3rd position in Mental Calculation World Cup | 2014 |
| Social | Languages Known - English (Fluent), Hindi (Fluent), Gujarati (Fluent) | |
| Interests/Hobbies | Reading, Art and Playing badminton | |