



# Rishab J. Patra

Management Graduate in Finance

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Date Of Birth:- 21/April/2002

## SUMMARY

Recent Bachelor of Finance graduate with a strong foundation in finance and marketing, complemented by hands-on internship experience. Well-versed in financial markets, banking products, and customer service principles. Demonstrates strong interpersonal, communication, and problem-solving skills, with a proven ability to collaborate effectively in team environments. Eager to contribute in a dynamic Management Trainee role by leveraging academic knowledge and practical experience to support client relationships, enhance customer satisfaction, and drive business growth.

### Education

- **G.L.S (Gujarat Law Society) University**  
Masters Degree in Business Administration  
2023-25 (Pursuing)  
Bachelor's Degree in Business Administration  
2020-23
- **The New Tulip International School**  
10th - 77%  
12th - 73%

### Experience

#### ANALAH CAPITALS

Wealth Manager

(1 Jan 2025 - 19 May 2025)

- Creating personalised financial plans that are in line with the objectives of each customer and oversee diversified investment portfolios.
- Build strong client relationships and ensure high service standards.

### Internship

#### CMEXPERTISE INFOTECH PVT. LTD.

Marketing Intern

(15 April,2024 - 15 June 2024)

- Determine the industry trends and prospective customers
- Engage with clients to understand their requirements, communicate with them via phone, email, and in-person meetings.

### Skills

- Financial statement analysis
- Risk Management
- Microsoft Office
- Team Management

### Achievement & co-curricular activities

- NEETI Business Plan
- MOSAIC DBI Stock Exchange
- Chanakya neeti Competition
- Avantika cultural Olympiad

### Certifications

- NISM - Series VIII - Equity derivative
- Investment Banking By Great Learning
- HSBC - Wealth and Personal Banking Job Simulation By Forage
- Fundamentals & Technical analysis in financial market.

### Projects undertaken

#### CMEXPERTISE INFOTECH PVT. LTD

Project title - A report on influence of healthy meals. on eating habits of Millennials and Zillennials

### Languages

- English
- Bengali
- Hindi
- Gujarati