

JOB DESCRIPTION

About us: -

Fundsroom is a recognized Fintech platform under Start-up India that provides one single platform for all major investment asset classes ranging from Stocks, Mutual funds, Digital Gold, Insurance, Real estate, and Banks. Essentially, we bridge the gap between the customers and service providers through our platform. Fundsroom is a registered start-up under AMFI, BSE, and Start-up India and is one of the fastest emerging Fintech start-ups within the region and country.

Roles Offered: - Business Analyst Intern / Financial Analyst Intern / Marketing Analyst Intern

Job responsibilities: -

1. DEMAT Account openings (10-15 Accounts) on given service providers.
2. Trading sessions [live] and detailed analysis for stock portfolios
3. Creating Business portfolios for clients and analysing the need of clients and suggesting stocks accordingly
4. Creating Business reports [portfolio analysis for given investment asset classes using various Business intelligence tools.
5. Creating Business and data analysis reports and projecting and representing data using Business Intelligence software [Power BI, Tableau, Qlik view] for stock portfolios
6. Understanding the requirement and satisfying the Business demand using the financial skills and tools
7. Promote Fundsroom through the SMM platform and onboard new customers for Fundsroom applications and websites.

Eligibility: -

1. Good Communication, Innovative approach, analytical skills
2. Basic Knowledge of Business Intelligence software, Data analysis.
3. Candidates from Marketing & Finance, management background must.

Note: -

1. Duration: - 30 days (can be extended as per the performance)
2. Mode of Internship: - work from home
3. Timing: 2-3 hrs. a day

Benefits: -

1. Workplace training in marketing and finance domain.
2. Basic training in the stock market trading and portfolio management
3. On successful completion of the first month, the candidate will be promoted to a full-time internship where the area of work will be related to the Domain applied [Marketing] work or as a Team leader.
4. Future career options with Fundsroom [PPO] and LOR (letter of recommendation).
5. Portfolio management and Marketing Research Certification on successful completion of total work.
6. Stipend will be available in a range of Rs 2000-4000* (considering 12 Demat accounts are completed and Research reports are submitted on time).

CASE STUDY

What is the internship about?

The internship is divided into two modules:

- Product and business understanding
- Marketing analysis, Business Analysis, and Portfolio management

Common for all Domains 10 Days: -

1. Onboard 10-15 customers for our stockbrokers and open DEMAT accounts from friends, family, and colleagues.
2. Teach them the basics of investment and how to invest in the stock market and start their basic trading journey (a minimum of 3 people should learn how to do trading).
3. Basic trading sessions and understanding customers' financial requirements.
4. Creating Business and data reports utilizing data to project future growth and create portfolios for long term and short-term investments.

Specialization/ Domain Work

Module 2- 20 days

Financial Analyst –

1. Create Business and data analysis reports, and research reports on various investment sectors.
2. Utilize your skills and prepare pitch deck reports and data analytical reports using business intelligence software [Power BI], training will be provided in-house.
3. Create Data set and utilize the data set in the best possible manner to project the portfolio for the client and sort multiple databases into simpler and smart reports.
4. Live Trading sessions and creating portfolio and financial reports for the clients on board from

Marketing Analyst –

1. Create marketing strategies, ideas, and content for the offline and online markets.
2. Work on the basics of SEO and SMM strategies.
3. Strategies to enhance the social media reach and organic content reach through data analysis and business reports utilizing best BI, Financial, and marketing techniques and tools.
4. Promote Fundsroom through the SMM platform and onboard new customers for Fundsroom applications and websites.

Business Analyst –

1. Bridging the gap between marketing analysis and financial analysis.
2. To take care of the business's functional aspect which includes the steps and ways to ensure the working of the project.
3. Strategic management, analysis of the business model, designing the process, and technical analysis.

Interview Questions: -

In module 1 you have to open a minimum of 8 DEMAT accounts and a maximum of 15+ from your friends, family, and colleagues in the first week, and in the second week you have to start your investment journey in stocks by teaching them the basics of trading and investment analysis so for this MODULE 1:

1. What will be your approach?
2. Who will be your customer target?
3. How will you break down the customer target to satisfy the above-given target?
4. How will you approach them and what strategies will you use?
5. The module 1 task needs to be completed in the first 10 days so how will you utilize your days and how will you complete the task?
6. In how many days will you ensure that the first 8 customers are onboarded and who will be your customer target?
7. How will you train them to invest in the stock market utilizing marketing reports and data?
8. Do you have basic knowledge of the Stock Market and DEMAT account?
9. What content and post strategies will you use for creating marketing reports?
10. What are your interested areas for Domain work?
11. Why are you applying for this internship?