HARSH JHA

JAGSoM Jagdish Sheth School of Management | AACSB Accredited

ACADEMIC PROFILE

PGDM	6.4 CGPA	Jagdish Sheth School of Management, Bengaluru	2025
BCOM (Hons.) – Accountancy and Finance	65.47 %	The Bhawanipur Education Society College, Kolkata	2021
Class XII(ISE)	61.50 %	The Assembly of God Church School, Kolkata	2018
Class X(ICSE)	60.80 %	The Assembly of God Church School, Kolkata	2016

AREAS OF STUDY

Merger and Acquisition, Advanced Corporate Finance, Security Analysis and Portfolio Management, Technical Analysis, Alternative Investment, Wealth Management, Fixed Income Securities, Derivatives, Business Valuation & Private Equity and Financial Statement Analysis

ACADEMIC PROJECT(S)

Advanced Corporate Finance: Mutual Fund Ratio Analysis

- Created an excel based ratio calculator for Small, Mid and Large Cap mutual funds comparing the fund's performance with the respective benchmark consisting of HDFC Nifty Small Cap ETF 250, Nifty Midcap 100 and Nifty 50 respectively.
- The calculator can compute important ratios like Sharpe, Sortino, Treynor and Jenson Alpha for the given fund categories and their benchmark making it easier for early investors to assess the level of risk and invest accordingly.
- The objective of this project was to automate calculation of ratios the procured data and state the risk level of the fund.

Financial Accounting and Financial Statement Analysis: Financial Performance Comparison Between BMW and Volkswagen (2016-2019)

- The project aims to conduct a detailed financial analysis of BMW and Volkswagen, focusing on the period from 2016 to 2019. By examining key metrics such as total revenue, cost of revenue, and profitability ratios like Return on Capital Employed (ROCE), the analysis seeks to provide insights into each company's financial health and operational efficiency.
- The analysis involved organizing income statement data for both companies. BMW's total revenue increased from ₹8,289,344 million in 2016 to ₹9,171,480 million in 2019, while Volkswagen's revenue grew from ₹19,118,496 million to ₹20,755,712 million in the same period. Profitability was assessed using ROCE, which for BMW declined from 7.79% in 2016 to 5.10% in 2019, indicating a decrease in efficiency. Volkswagen's ROCE fluctuated but stayed within a stable range, with averages indicating better capital utilization over the years.
- The comparative analysis reveals that BMW, despite steady revenue growth, showed a declining trend in ROCE, signaling a drop in its ability to generate profits from capital. In contrast, Volkswagen exhibited more consistent profitability, managing to keep ROCE relatively stable despite rising costs. Overall, Volkswagen demonstrated stronger financial performance, with a slight edge in profitability trends and capital efficiency.

Wealth Management: Efficient Portfolio Construction

- Identified 5 growth stocks from different industries which are ITC, SBI, Wipro, Ultratech and Tata Motors using momentum score calculation and compared it with the benchmark of BSE 200.
- Calculated risk and return of each stock using Correlation and Variance Covariance Matrix and finally arrived at the portfolio variance, risk and return and beta and assigned equal weightage to each stock to replicate and an efficient portfolio.
- The objective was this project was to bring out the concept of Efficient Frontier and Capital Allocation Line.

Advanced Fundamental and Portfolio Management: Comparative Analysis of Active vs Passive Managed Fund

- Conducted detailed performance report of Kotak Small Cap Fund for the period from June 2013 to March 2024, on quarterly basis by allocating ₹20,000 in each stock from the beginning to the end of March 2024.
- The project demands to incorporate all the corporate actions like Dividends, Merger and Demerger, Bonus Issue and Stock Splits individually to each stock and calculate the number of shares and the portfolio value every quarter.
- The objective of this project was to differentiate between Active and Passive management of the fund. The CAGR which was generated during this period was 33.76% in passive investing, beating the benchmark Nifty Small 250TRI by 5%.

Python Programming: Creating Efficient Frontier Curve

- Developed the project 'Portfolio Optimization using Efficient Frontier in Python' using SPIDER as the core visual code editor, consisting of 200 stocks listed in NSE and implemented codes like "numpy" and "pandas" for data handling, and "matplotlib" for visualizing the Efficient Frontier curve.
- This project also required using mean variance analysis of the stocks compared to its benchmark Nifty 200.
- The objective of this project was to create an efficient frontier curve using Python Programing Language understanding data handling structure of the python library and how to use it to generate the curve in an easy manner with less required time.

CERTIFICATIONS

Bloomberg Market Concept	Bloomberg	2024
Bloomberg Financial Markets	Bloomberg	2024
FinanceTraining	Externclub	2024
Investment Analysis and Portfolio Construction	NSE Academy	2023
Wealth Management	NSE Academy	2023
Mutual Fund Distributor Exam	NISM	2023
Financial Modelling	Wharton Business School (Coursera)	2023
Equity Derivatives Series VII Exam	NISM	2022

POSITIONS OF RESPONSIBILITY

JAGSoM, Bengaluru

Member – External Relations and Placements Committee — 2023 - 2025

- Corporate Visits: Facilitated 3 corporate visits, which contributed to the relationship building between the college with the corporate houses.
- Event Coordination: Assisted in 2 major events IIP Viva-Voce I & II and Panel Discussions also contributing recruitment drives, and networking events to connect students with potential employers and enhance placement success.

Equity Research Analyst at Student Managed Investment Fund (JAGSoM): — 2023-2025

- Giving recommendations for two fundcategories Equity Fund and Hybrid Fund, which has given 23.73% and 17.58% return for the last quarter.
- The core sector of research was Cement, BFSI and Renewable Energy, in which the last recommended stocks were Waree Renewable Energy, ACC Cement and Bajaj FinServ.

SKILLS

- Technical and Fundamental Analysis of Securities, Python, Excel, Analysis of Financial Statements, Financial Modelling, Investment Research