



Give wings to your Financial Plan

# MAGNUM FINVEST SERVICES

5 CLIVE ROW, 8TH FLOOR ROOM NO F KOLKATA 700001

## Recommendation letter for Mr. Ujaan Ghosh

**Date: 20 Feb 2022**

It is my pleasure to write a recommendation for Mr Ujaan Ghosh, a student of La Martiniere for Boys, Kolkata. He worked with Magnum Finvest Services as an intern for six weeks from Dec 1 2022 to Jan 15 2023. Magnum Finvest Services is one of the leading Financial Advisors in Eastern India, recognised as the preferred Financial Wellness Partner in February 2020 by PGIM India Mutual Fund and HR Sampark. In addition, we are also recognised as a "Volatility Coach of India" by Economic Times. We also conduct Gamification Workshops besides regular Financial Planning and Wealth Management workshops. As Ujaan's supervisor, I can attest he was an excellent intern, displaying tremendous potential for his knowledge, enthusiasm, and work ethic.

Ujaan worked on our Financial Literacy module for students as part of a larger exercise on a future customer acquisition strategy. He also assisted in routine administration tasks, research projects, and portfolio analysis. I was enthused to observe his freshness of ideas, clarity in articulation and tremendous execution focus, which is seldom found in premiere B-School MBA students. His understanding of the financial services industry surpassed his curriculum. Moreover, his ability to communicate precisely, meticulous approach and process orientation made him an integral part of our team.

Ujaan was assigned the challenge of acquiring new customers for our Mutual Fund distribution business and a bigger challenge of retaining them. He analysed the industry, competitors, and consumer behaviour and presented his "Catch them Young" idea. He germinated the concept of financial literacy for school students, getting them enthused and then engaging with them through a Finance Club membership.

Through most of his internship, Ujaan worked on building the Finance Club, providing free online financial literacy modules and a platform for students to learn and network with industry professionals at our company. He also recognised the need for a "What's in IT for Me (WIIFM)" objective to attract the youth of his generation and hence ideated on a formal certification. Ujaan quickly picked up the intricacies of such an exercise from a Financial Adviser perspective, ensuring regulatory compliance and effective exercise modules. He has taken the initiative to further integrate this module into his personal website, a collaboration we are confident will deliver excellent results.

Magnum Finvest Services  
*Sourabh*  
Proprietor



**Email**

sourabh@magnumfinvest.in



**Phone**

9836043827



**Website:**

www.magnumfinvest.in



Give wings to your Financial Plan

## MAGNUM FINVEST SERVICES

5 CLIVE ROW, 8TH FLOOR ROOM NO F KOLKATA 700001

I would also like to highlight that Ujaan's acumen for research as he assisted us in analyzing portfolios of the clients. He was an excellent contributor who took feedback constructively and improved on them. He established a firm grasp of evaluating Mutual Funds and setting up fund selection criteria based on correlation, portfolio overlapping & risk-return parameters. Further he has taken deep dive exercise in understanding key ratios such as Standard Deviation, Volatility, Alpha, Sharpe ratio. Understanding the risk-return profile of a mutual fund will enable him to guide investors to make informed investment decisions and choose a fund that aligns with their investment goals and risk tolerance.

Ujaan has been a team player, maintaining the highest standard of work ethic in his project detailing, timely submissions, and constant feedback loops. Ujaan's sense of diligence towards his projects and respect for all were commendable. Ujaan's work was well appreciated, and he stood out for his strong aptitude for the subject. He has the makings of an incredible leader, and a nurturing environment would push him to do wonders.

His enthusiasm still resonates with us, and I would like to conclude by emphasising that Ujaan possesses the essential skills and methodological rigour for a successful career in finance. He will be effective in all roles, especially with organisations looking to transform their sector and achieve exponential growth. He will be an asset to any institution and its community and holds my highest recommendation. You may contact me for any further clarification.

**Regards,**

Magnum Finvest Services

**Sourabh Jain** Proprietor

Founder -Magnum Finvest Services



**Email**

sourabh@magnumfinvest.in



**Phone**

9836043827



**Website:**

www.magnumfinvest.in