

## Dr. Pooja Gupta

(M. Com, MBA (Finance), CFA (India), NET, Ph. D)



---

***To explore the opportunities of growth and inventiveness with the aptitude of experiment and innovative bend, to examine the combination and liberty to apply conventional and non-conventional methodology to teach, train and develop aspirants, with the leading academia of the country.***

---

- ✓ **Chartered Financial Analyst (C.F.A. India) and Masters in Business Administration (M.B.A. in Finance)** with deep experience as a Finance Specialist.
- ✓ A well-rounded professional carrying a wide repository of knowledge spanning knowledge of various counseling and assessment techniques; the ability to evaluate their clients' needs; up-to-date knowledge about education and training information
- ✓ Strong business acumen with skills to remain on the cutting edge.
- ✓ Excellence in Analysis and Problem Solving;
- ✓ Sound Judgment and Decision-Making Skills.
- ✓ Possess strong Influencing skills.
- ✓ Possess effective communication and counseling skills.

---

### CAREER HIGHLIGHTS

Ajeenkya D. Y. Patil University

Sept 19 - till date

#### **RS, Coordinator & Sr. Faculty – SOM iNurture**

- Delivering lectures for the subjects –
  - ❖ Cost Accounting
  - ❖ Management Accounting
  - ❖ Financial Management
  - ❖ Income Tax
  - ❖ Corporate Tax
  - ❖ Securities Analysis and Portfolio Management
  - ❖ Derivatives and Commodities Market
- Special faculty for – Certified Management Accountant (CMA - US)
- In-charge for organizing Industrial tours and educational trips for students
- In-charge for extra-curricular sports and cultural activities for the students.
- Member of the discipline and anti-ragging committee of the college.
- Member of BOS committee of the university.
- Member of NAAC committee.
- Member of Task Force for Quality Improvement and Review.
- Implementation of Innovative teaching pedagogy to engage students in online teaching-learning process.
- Organize activities for technical training and upgradation programmes for faculties within the department and in other partnering university across PAN India.
- Review of course TLPs and Session Plans
- Coordination with different departments like admission, administration, examination, placement and other verticals to organize orientation and awareness programmes for faculties and students to ensure apt communication and flow of information.

### **Key Responsibility Areas**

- Design and upgradation of the existing course curriculum
- Conduct, supervision and organizing the regularity of class-room training at BMS Program
- Innovative efforts to engage students of BMS program
- Member of Admission committee of the college
- Assistant Research Programme Coordinator
- Discipline committee member of the college
- Member of Board of Studies for the courses offered at Jagran Lakecity Business School
- In-charge & Coordinator for organizing FDP's on Case-based teaching & Case-writing and development
- Coordinator for Industrial Visits within & outside Bhopal.
- Coordinator for organizing Workshop in collaboration with Bhopal Stock Investor's Association (Regd. with SEBI)

### **Teaching Expertise:-**

- ❖ Financial Accounting
- ❖ Financial Management
- ❖ Cost & Management Accounting
- ❖ Derivative Management
- ❖ Security Analysis and Portfolio Management

- Delivering lectures on specialization subject of :-
  - ❖ Accounting for Managers
  - ❖ Financial Management
  - ❖ Project Management
  - ❖ Security Analysis and investment Planning
  - ❖ Direct Taxes
  - ❖ Corporate Taxation

### **Key Responsibility Areas**

- Departmental coordinator for Training and Placement
- Discipline committee member of the college
- Anti- Ragging committee member of the college
- Committee member of Financial matter committee

### **Investment Trainee**

- Analysis of Mutual Fund and learning for advising clients the best schemes in their interest.
- Interacting with clients and understanding their portfolios as per the financial needs of the clients.
- Understanding the process of Financial Planning through mutual funds under the expert guidance.
- Analyze the investment trend and explore the marketable opportunities.
- Understand the technical graphs of scrip and apply the study in selecting the securities.
- Knowledge of various up-trends and downtrends with reference to market forces.
- Understanding the risk-return potentialities of the investor.

### **Asst. Centre Manager**

- Conducted seminars and workshops for college students (MBA)

- Conducting seminar for professionals to enhance the understanding for Financial Planning under the expert guidance.
- Attend seminars and meeting conducted by the Indore CFA association.
- Conducted classes for CFP (Challenge Status Program) for group of State Bank of India
- Training for AMFI (Advisory Module)

- Research on the clientele creditability based on industrial parameters.
- Executing and releasing the orders based on the payment behavior of the customer.
- Intimating the client for the payment on the due dates.
- Attending the client queries and satisfying them as per the SOP's.
- Achieving the collection targets within the deadlines.
- Periodically formulating the business reports regarding the roll-ins and risk accounts.
- Acting as the liaison between the Sales team and the Cash application team.

- Extend and offer guidance to people making life choices, which include education, training and work-related plans, identify skills and career values.
- Advise on interview and job search strategies and techniques
- Arrange work experience and job placements
- Run workshops on career planning, development, transitions and other relevant topics
- Write and produce a range of career-related publications.
- Meet and talk with employers about workplace and employment issues.
- Develop training programs and assist educators or facilitators to run them.
- Facilitate co-operation with other Universities, Institutions as well as Organizations and Corporate Bodies.
- Align student's interests with potential opportunity careers to guide students in effective decision-making regarding their career direction and future fields of study.
- Identify training needs across levels through mapping of skills required for particular positions and analysis of the existing level of competencies.
- Provide leadership to administrative staff ensuring high quality of servicing & operations is imparted.
- Supervise the planning and decision-making process by facilitating and accounting for the preparation and implementation of the Improvement Plan.

---



---

## EDUCATION

2017	<b>Post-Graduate Diploma in Disaster Management</b> from DMI, Bhopal.
2015	<b>Ph.D.</b> in Commerce from Barkatullah University, Bhopal.
2013	<b>National Eligibility Test (NET)</b> in Commerce, qualified for December 2012.
2012	Pursuing <b>Company Secretary (Executive level cleared)</b> from I.C.S.I.
2010	<b>Chartered Financial Analyst (IUT-CFAC14075)</b> from I.C.F.A.I. University, Tripura
2008	<b>Bachelor of Education (B. Ed)</b> from Millennium College, Bhopal (M.P.)
2006	<b>Master of Business Administration (MBA)</b> from I.C.F.A.I. University, Dehradun
2001	<b>M.Com</b> from Safia Arts and Commerce College, Bhopal (M.P.)
1999	<b>B.Com</b> from Safia Arts and Commerce College, Bhopal (M.P.)

## ACHIEVEMENTS

- Resource person for Entrepreneurship Development Institute of India, Ahmedabad (**EDII**)
- Resource person in the investor awareness program **“NIVESH”**, LIVE TELECAST across India by Doordarshan, Bhopal
- Resource person for Bhopal Stock Investor’s Association (Regd. with SEBI) in the **“Investor’s Awareness Programme”**
- Resource person for Institute of Chartered Accountants of India, Bhopal chapter for **FDP programme in Bhopal**
- Content developer at **Mahatma Gandhi Antarrashtriya Hindi Vishwavidyalaya**, Wardha, Maharashtra
- Member of Institute of Chartered Financial Analysts of India (**ICFAI, India**)
- Member of Bhopal Management Association, (**BMA**)
- Published newspaper articles for investment awareness as a freelancer for a daily newspaper **“Haribhumi”** published and circulated in Madhya Pradesh, Chhattisgarh, Haryana and Delhi
- Published newspaper articles under the head **“Sow Money, Grow Money”** as a freelancer for a daily newspaper **“Absolute India”** published and circulated in Bhopal and Mumbai
- Editorial Board member of the online journal **“Vishleshan International Journal of Engineering & Management”**
- **Best Paper** award at National seminar in Feb 2015 at School of Management Science, Lucknow
- **Best Paper** award at International conference in Sept 2016 at Patel Group of Institutions, Bhopal
- Awarded with certificates and prizes for active participation in School and College programs

## BOOK(S)/RESEARCH PUBLICATION

- Published 2 units in edited book titled **“Introduction to Environmental Economics”** at Krishna Kanta Handiqui State Open University, Guwahati, Assam. ISBN: 978-93-89559-98-9, **Jan 2020**.
- Published 2 units in edited book titled **“Public Finance and Policy”** at Krishna Kanta Handiqui State Open University, Guwahati, Assam. ISBN:978-93-89955-69-9, **Mar 2020**.
- Published 1 book title **“Business Legislation for Entrepreneurs – Vol. 1”**, Edition 1, Notion Press, with ISBN-10-1637141610, ISBN -13- 978-1637141618, **Nov 2020**.
- Paper published titled **“BEHAVIORAL TRAITS OF INVESTORS IN REFERENCE TO THE BEHAVIORAL THEORIES, DURING COVID-19”** in in UGC care listed quarterly bi-lingual journal - Shodh Sarita, Vol. 7, Issue 28, **Oct-Dec 2020**, ISSN 2348-2397, pp1199-204.
- Article published in Annual Report 2020-21 of Bhopal Stock Investors Stock (Regd. SEBI)

## PAPER PRESENTED

- **“Impact of Alliances on Industrial Growth and Social Upliftment”** presented in **International Seminar** at Singhad Institute of Business Administration and Research, Pune (2010)
- **“Mergers and Acquisitions: A tool for managing global business in competitive environment, as indicated by various economic indicators”**, presented in **National Conference** at Rattan Group of Institutions, Mohali Chandigarh. (2010)
- **“A study on impact of mergers and acquisitions as tool of economic and industrial growth as reflected by various economic indicators”**, submitted for publication in Moolah, International Journal of Commerce and Allied Subject.(2010)
- **“A study on the growth prospects of the economy and performance evaluation of the Infra-structure funds in India, as an investment strategy adopted to provide higher returns and turning recession to opportunity”** presented in **International Conference** at VNS Institute of Management, Bhopal (2010)
- **“Growth Prospectus of Mutual Fund industry in Infra-structure sector”**, published in BSSS Journal of Management (2011)
- **“Mutual fund industry: An emerging investment avenue in the financial markets of India”**, published and presented in **National Commerce Seminar** at Govt. Hamidia Arts and Commerce College, Bhopal (2014)
- **“A study of trend in competition among public-sector and private-sector sponsored Mutual funds of India”** presented in 67<sup>th</sup> All India Commerce Conference, Bhubaneshwar (Dec 2014)

- **“A study of trend in asset allocation among public and private sector sponsored Mutual Funds in India and its impact on the performance of open-ended equity funds”** published in Adhyayan- A Journal of Management Science, Lucknow (June 2014)
- **“A study on factors for investor dissatisfaction towards Mutual funds in Bhopal city”** presented and published in National Seminar on “Leading organizations for sustainable growth”, at School of Management Science, Lucknow (awarded as **“best paper”**) (Feb 2015)
- **“A study on investor awareness of Mutual funds as investment options by the investors in Bhopal”** accepted for presentation and publication in National Seminar in Oriental College of Bhopal (May 2015)
- **“A study on investor preference towards private-sector sponsored and public-sector sponsored Mutual Funds, in Bhopal city”** presented in International Seminar in NIRMA UNIVERSITY, Ahmadabad (Jan 2016)
- **“A study on fading shine of Mutual fund, as a preferred investment option among the investors, with special reference to Bhopal city”** accepted for presentation and publication in National Seminar at Sagar Institute of Management, Bhopal (Mar 2016)
- **“A study on attitude towards the financial awareness in empowering the females in India, with special reference to Bhopal city”** presented and published in International Conference on Women Empowerment in Digital India, Bhopal (awarded as **“best paper”**) (Sept 2016)
- **“A study on need to enhance financial literacy in empowering the females in India, with special reference to Bhopal city”** presented in 69<sup>th</sup> All India Commerce Conference, by University of Lucknow (Nov 2016)
- **“A study on emerging trends in behavior finance among the investors, with special reference to Bhopal city”** presented and published in 11<sup>th</sup> International Conference on Developing Competencies and Skills for Global Competitiveness, by PIMR Indore (Feb 2017)
- **“Behavioral traits of investors with reference to behavioral theories during COVID 19”**, presented and submitted in Multi-Disciplinary International Conference on Transformation and Survival Post Pandemic on 14<sup>th</sup>-15<sup>th</sup> October 2020 by Ajeenkya D. Y. Patil University.

---

## WORK-SHOPS AND SEMINARS PARTICIPATED

- Attended 8 e-FDPs, 20 webinars, 8 national and international conferences and 3 MOOCs for online teaching & learning development during COVID 19 lockdown for Mar20-Mar 21.
- Attended a **“Train the Trainers program”** of LUGI, at Coimbatore.
- Attended work-shop by SMF-Management Teacher’s Programme on **“Strategic Management”** at IIM Lucknow, approved by AICTE.
- Attended seminar on **“Global Economic meltdown- Response, Resilience, and Revival Strategies”** at VNS Institute of Management.
- Attended the SDF on **“Soft Skills and Etiquettes”** at VNS Group of Institutions, Bhopal
- Attended the FDP on **“Research and Data Analysis Using SPSS”**, at VNS Institute of Management, Bhopal
- Attended the presentation on Case study workshop at VNS Institute of Management.
- Attended seminar on **“India Becoming World Leader by 2020”** at VNS Institute of Management.
- Attended seminar on **“Emerging Trends in Banking, Insurance and Financial Services”** at VNS Business School.

---

## WORK-SHOPS AND SEMINARS ORGANIZED AND CONDUCTED

- Organized 4-days workshop on Research Methodology in Management
- Organized 8 e-FDPs on SPSS, Mendely, Zotero, and Google Scholarly articles at ADYPU Pune.
- Organized 20 online webinars for students and faculties at ADYPU, Pune during COVID 19 lockdown for Mar20-Mar 21.
- Resource person for various webinars and orientation programs at national level during COVID 19 lockdown for Mar20-Mar 21.
- Resource person for Entrepreneurship Development Institute of India (EDII), in thematic training programme on **Financial Management** under **Ministry of MSME – National Hub for SC/ST**, for existing, aspiring and budding entrepreneurs at Bhopal, Gwalior, Indore, Jaipur, Ajmer, Ahmedabad.
- Resource person for UGC sponsored 15 days **FDP programme** at BSSS College, Bhopal.
- Presentation delivered on **“How to be employable during recession”** at VNS Institute of Management.
- Presentation delivered on **“Impact of Union Budget 2012 on Indian economy”** at VNS Institute of Management.

- Presentation on book review **“Unfold the unfathomable with- The Secret”** at VNS Institute of Management.
- Presentation on **“Sow Money, Grow Money”** at Excellence Institute of Higher Education (IEHE).

---

## OTHER ACADEMIC/NON-ACADEMIC PROGRAMMES ORGANIZED AND CONDUCTED

- Organized 5 days FS Colloquium – Vittiya Vishleshan for students to conducted online extra-curricular activities with finance theme to engage students in online teaching-learning.
- Organized investment awareness programme on Mutual Funds for **“Nyaka – Women’s Club”** for NavDuniya newspaper, in Bhopal.
- Organized investment awareness programme for on Mutual Funds **“Astitva – Women’s Club”** for Haribhumi newspaper, in Bhopal.
- Conducted MDP on soft skills for grade III officers of Anant Spinning Ltd., at Jagran Lakecity University, Bhopal.
- Conducted field audit at Bhopal Utsav Mela and submitted the report on **“Disaster preparedness at Bhopal Utsav Mela”** to Disaster Management Institute, Bhopal.
- Conducted one day soft-skills workshop for faculties at Mittal Group of Institutions, Bhopal.
- Conducted one day workshop on time-management for the senior secondary students at Holy family Sr. Sec. School, Bhopal.
- Organized **“Igniting Minds- lecture series”** by renowned speakers of Madhya Pradesh to motivate management students at Jagran Lakecity University, Bhopal.
- Organized several expedition and educational industrial visit/tours for Bachelors and Masters Students in Jagran Business School and VNS Institutions, Bhopal.
- Organized financial training programmes for final year students in collaboration with Reliance Securities, Birla Sunlife, Bank of Baroda, SBI and Bhopal Stock Investor’s Association to enhance their employability skills.
- Organized **“Treasure Hunt”** competition for the Management students to learn team-work and coordination at Jagran Lakecity Business School, Bhopal.
- Organized **“Skit-competition on environmental issues”** on environment day in Jagran Lakecity University, Bhopal.
- Organized **“Nukkad Natak on corruption and feticide”** with participation of JLU students at Jagran Lakecity University, Bhopal.
- Organized inter-college **“Financial Cross-word Competition”** to promote financial learning at Jagran Lakecity Business School, Bhopal.
- Organized and conducted movie reviews under **“Open-source learning programmes”** at Jagran Lakecity University, Bhopal.
- Organized **“Shaktim- Power of Corporate”** – a mini fair of local and national products by MBA students to understanding of product content, utility, costing and develop marketing skills in VNS, Institutions of Management, Bhopal
- Organized and conducted FDP for management faculties on **“Case-based teaching and Case Writing & Development”** at Jagran Lakecity University, Bhopal.

---

## COMPUTER APPLICATIONS

MS-Office (MS-excel and MS-word)

Internet

E-mail

---