Finance Club Activity Report FY23

Highlights

8000+ Views 1600+ Followers 600+ Club Members 25+ Core Team Members 10+ Workshops & Webinars 6 Industry Partnerships 4 Alumni Mentors 3 Alumni Events

2,700

2,600

,500

2,400

2,900 2,720

10 DAYS



Within 1 year of its foundation, the Finance Club has established its presence in all departments across faculties, and is now home to the first and only community of finance, investment, consulting & analytics enthusiasts in Jadavpur University.



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Membership Form

finclubju.com/join

Recruitment Form

finclubju.com/apply

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About FinClub Our Story, History, Mission and Vision

FinClub's journey started on a random October afternoon in 2021 with a small group of dedicated students who would not stop before making their dream a striving reality, and since then there has been no looking back. This is the story of our ups and downs, our history, mission and vision.

Jadavpur University is a premier public research university in Kolkata, and an Institute of Eminence recognized by the University Grants Commission. Ranked 4th among Indian universities by the National Institutional Ranking Framework, Jadavpur University is home to some of the brightest minds in West Bengal and India at large. With a growing interest in finance, consulting and analytics among students and increasing placements in these domains, there is a demand for more workshops, seminars and learning events as well as the right guidance for participating in finance and case competitions and for taking up live projects for startups, NGOs and business clients. Therefore, we saw the creation of a Finance Club in JU as the need of the hour.

With 600+ members and a 3-tier core team, FinClub is now home to the largest community of finance, investment, consulting and analytics enthusiasts in Jadavpur University.

The purpose of establishing the Finance Club was to provide the perfect place and the best available resources for students to explore the worlds of finance and consulting, and enhance their knowledge, and to promote, encourage and facilitate discussion on and understanding of everything business – business news, financial markets, the financial services industry, business consulting and analytics, as well as exploring and preparing for career opportunities in finance and consulting.

Our mission is to create a strong business culture which benefits the entire student community and provide a platform for upskilling and professional growth and development, a shared investment in knowledge which is destined to yield huge returns for all.

We have distinguished the Finance Club from other clubs and societies by adopting a structured and organized approach towards learning and career development through seminars, lectures and workshops on finance and consulting topics, emphasizing on networking with alumni and other professionals, providing a route map for proper practice and experience through participation in national and international case solving and finance competitions, and finally by encouraging application of acquired skills by doing client projects. Our ultimate mission is to impart knowledge in a comprehensive and organized form so that every member joining our community with a desire to explore and learn, leaves as a confident individual with a strong understanding of the financial world.

Our vision behind establishing the Finance Club included but was not limited to providing quintessential financial knowledge in an organized form, supplemented by appropriate training for global contests, in an effort to provide the right exposure to the community of finance and consulting enthusiasts in JU. Our vision resonates with that of finance clubs and societies in colleges across India – to foster an ecosystem of growth and learning among our members, prepare them for careers in finance and consulting and provide them with a reliable and exhaustive reference in these domains.

We are motivated by our goal of helping our members build their network and connect with the smartest minds in their field. We believe that participation in intra and inter college events and competitions, combined with interaction with like-minded individuals, will provide our members with avenues for further personal and professional growth, in line with our vision and aim to empower and educate future finance and business leaders.

We're a unique community, the first of its kind in Jadavpur University. And, we are always looking forward to more enthusiastic students and alumni to join our community.

If you are a student currently enrolled in any undergraduate, postgraduate, diploma or doctoral program under any faculty in Jadavpur University and you wish to explore finance, investment, consulting and analytics, you can join FinClub by filling the membership form at **finclubju.com/join**.

If you are interested in applying for any role within the FinClub team, you can do so by first reading the "Team Recruitment Rules and Regulations" and the "FY24 Recruitment Drive - Application Rules and Guidelines", both given in this Activity Report, and then applying online at **finclubju.com/apply**.

If you are a Jadavpur University alumnus currently working in finance, investment, consulting or analytics and you wish to be associated with FinClub in an advisory and mentorship role, or if you wish to conduct a training or interaction session for students, drop an email at **finclubju@gmail.com**.

Our Teams, Advisors and Work Structure

FinClub's multi-tier management team works round the year, brainstorming new ideas, improving existing systems and solving problems to ensure organizational excellence. We believe every member on our team is an asset to the team as a whole. This is the story of the passionate individuals who make it all possible. FinClub's diversified work structure includes a board of advisors with faculty and alumni, an executive team, 6 operational teams - treasury, editorial, PR & marketing, tech, design and logistics, and 6 functional teams based on our 6 pillars of work - finance, investment, social impact, consulting, analytics and literacy.

Board of Advisors

The Board of Advisors consists of the Faculty Advisor, former Core Team members and distinguished Jadavpur University alumni currently working in finance, investment, consulting or analytics.

Core Team

The Core Team consists of the following members.

- Advisors from the seniormost and recently graduated batches.
- An executive team comprising the President, Vice-President, Secretary and Joint Secretaries.
- Heads and Co-Heads of the 6 functional teams and selected Analysts and Sr. Analysts.
- Heads and Co-Heads of the 6 operational teams and selected Coordinators and Sr. Coordinators.

Operational Teams

The day-to-day administration of the club is managed by the 6 Operational Teams.

- The Treasury Team led by the Treasurer and Joint Treasurer (from different campuses).
- The Editorial Team led by the Editor-in-Chief and Joint Editor-in-Chief.
- The Public Relations & Marketing Team led by the Head and the Co-Head of PR&M.
- The Technical Team led by the Head and the Co-Head of Tech.
- The Design Team led by the Head and the Co-Head of Design.
- The Logistics Team led by the Head and the Co-Head of Logistics (from different campuses).

Functional Teams

The activities of the club in its F.I.S.C.A.L. domains are managed by the 6 Functional Teams.

- The Finance Team led by the Head and the Co-Head of Finance.
- The Investment Team led by the Head and the Co-Head of Investment.
- The Social Impact Team led by the Head and the Co-Head of Social Impact.
- The Consulting Team led by the Head and the Co-Head of Consulting.
- The Analytics Team led by the Head and the Co-Head of Analytics.
- The Literacy Team led by the Head and the Co-Head of Literacy.

Team Restructuring from FY23 to FY24

The work structure has been modified for more efficient functioning of the club in its domains.

- The work structure in FY23 included the board of advisors, the executive posts, the Treasurer and the Heads and Co-Heads of 5 teams Research, Editorial, PR&M, Tech and Design.
- In FY24, the Research team has been restructured into 6 functional teams (F.I.S.C.A.L), and the 4 other teams along with the new Treasury and Logistics teams constitute the 6 operational teams.
 Each of these teams is led by a Head and a Co-Head (title varies for treasury and editorial teams).

Club Membership Rules and Regulations

Membership of Finance Club is governed by the following rules and regulations.

- Membership is open to all students currently enrolled in any undergraduate, postgraduate, diploma or doctoral program under any faculty in Jadavpur University.
- Membership is free of cost and is not subject to any criteria based on degree, course or grades.
- Membership is not subject to regularity of participation in club events and activities.
- Membership may be terminated on grounds of unruly or inappropriate behaviour.
- Members can voluntarily discontinue their membership without discontinuing their newsletter subscription or participation in events, courses and contests conducted by the club.
- Membership form can be filled online at finclubju.com/join.

Team Recruitment Rules and Regulations

Recruitment to roles within the team is governed by the following rules and regulations.

- Recruitment for FYnn (April 20(nn-1) to March 20nn) is made during April 20(nn-1).
- Existing team members graduating in 20(nn-1) are considered for the Board of Advisors and are expected to oversee the recruitment process for FYnn and advise the new team for 3 months.
- After June 20(nn-1), team members graduating in 20nn become the seniormost batch (UG4), so during recruitment, this batch (UG3) is considered for the seniormost posts within the team.
- Executive posts, President and Vice-President, and the Heads of the 12 teams are filled from UG3 members (who will be UG4 for most of their FYnn term), by the incumbent President on the advice of current UG3 (about to be UG4) and UG4 (about to graduate) members.
- Executive posts, Secretary and Joint Secretary, and the Co-Heads of the 12 teams are filled from UG2 members (who will be UG3 for most of their FYnn term), by the new President on the advice of current UG2 (about to be UG3) and UG3 (about to be UG4) members.
- Team positions, Senior Coordinators and Senior Analysts are filled from current UG3 (about to be UG4) batches by open recruitment through online portal on the basis of merit judged by Aptitude and Interview rounds conducted by the Core Team.
- Team positions, Coordinators and Analysts are filled from current UG2 (about to be UG3) and UG1 (about to be UG2) batches by open recruitment through online portal on the basis of merit judged by Aptitude and Interview rounds conducted by the Core Team.
- Newly appointed Senior Coordinators, Senior Analysts, Coordinators and Analysts, who were not promoted to these posts, are subjected to a 1 month non-permanent training period.
- Some Senior Coordinators, Senior Analysts, Coordinators and Analysts may be selected for Core Team membership based on their performance at any time.
- Application rules and guidelines are given at the end of this Activity Report.



Our Operational Teams

FinClub's 6 operational teams are responsible for the day-to-day administration of the club. The Senior Coordinators and Coordinators are recruited for the operational teams as a whole, and not for any individual team, however, based on skills, experience and interest, they are expected to work in one or more of these teams.

- 1. The Treasury Team is responsible for budget planning and maintaining accounts of revenue and expenditure of the club, overseeing sponsorships for events, managing merchandise procurement, orders and sales, and sale of paid services provided by the club.
- **2.** The Editorial Team is responsible for screening and publishing of articles for the blog, organizing article writing events, accepting alumni contributions, providing written content for club event promotion, and selecting content for newsletters.
- **3.** The Public Relations and Marketing Team is responsible for the overall promotion of the club and its events on campus as well as in other colleges, overseeing social media posts and promotions, and for maintaining communications with internal and external contacts.
- 4. The Technical Team is responsible for managing the website and all other online resources, broadcasting live events, managing all technical services provided by the club, and overseeing technical research projects related to finance and investment.
- **5.** The Design Team is responsible for creating digital media for club and event promotion as well as designing official merchandise, presentations, brochures and other printable material.
- 6. The Logistics Team is responsible for on-ground event management, booking halls and labs for offline events, maintaining storage and inventory of merchandise and other items, managing deals with local vendors and overseeing transportation of merchandise between campuses.



Our Functional Teams

FinClub's 6 functional teams are responsible for the activities of the club in its concerned domains. The Senior Analysts and Analysts are recruited for the functional teams as a whole, and not for any individual team, however, based on skills, experience and interest, they are expected to work in one or more of these teams.

- 1. The Finance Team is responsible for training, upskilling and career development in the field of finance, job preparation and industry training for careers in the financial services industry, and publication of learning material for general awareness of finance and economics.
- 2. The Investment Team is responsible for training, upskilling and career development in financial markets, job preparation and industry training for careers in investment management and trading, overseeing student-run multi-segment portfolios and publication of learning material.
- **3.** The Social Impact Team is responsible for managing all pro-bono and low-cost consultancy services provided by the club to social and corporate clients, overseeing client acquisition, managing client relations and coordinating case teams across all functional teams.
- 4. The Consulting Team is responsible for training, upskilling and career development in the field of consulting, job preparation and industry training for careers in management and strategy consulting, and publication of case studies, case book solutions and other learning material.
- **5.** The Analytics Team is responsible for training, upskilling and career development in the field of analytics, job preparation and industry training for careers in business and data analytics, and publication of analytics reports, infographics and analytics tools training material.
- 6. The Literacy Team is responsible for conducting financial awareness programs in regional schools and financial literacy drives in rural and underprivileged areas, partnering with NGOs and social initiatives with similar goals, and fulfilling the social responsibility of the club.

Available Services Training, Upskilling and Career Development Services

Since its inception, preparing students for careers in finance, investment, consulting and analytics has been FinClub's first priority, and training programs are at the heart of FinClub's mission.

- Classroom Subject Training and Job Preparation Sessions We conduct online and offline sessions on career-specific subjects and topics in accordance with curated learning and development pipelines for upskilling of interested students, and encourage group discussion sessions on finance, consulting and business topics and recent headlines.
- 2. Guest Webinars and Seminars with Alumni-Students Interaction Sessions We organize guest webinars and seminars on introductory as well as advanced topics, interaction sessions with alumni working in finance and consulting, and plan to organize special lectures by professors as well as talk shows and interviews with eminent professionals from finance and consulting.
- **3. Exclusive Industry Workshops with Live Projects and Practice Assignments** We organize exclusive hands-on workshops in collaboration with our industry partners to demonstrate topics using real world cases and for access to live projects and practice assignments, and plan to organize career advice sessions with target companies and arrange field visits to financial institutions like banks, exchanges and chambers of commerce and industry.
- 4. Intra and Inter College Finance, Investment, Consulting and Analytics Contests We have conducted a virtual trading contest and an equity research challenge annually during SRIJAN, and plan to conduct 16 flagship contests as part of FINCON starting this year. We also encourage students to participate in finance and consulting competitions conducted by other colleges and in global contests organized by business schools and corporate entities.
- 5. Exclusive and Open-for-all Self-Paced Certificate Courses with Learning Pathways We plan to introduce flagship certificate courses on 21 diverse topics with guided learning pathways which will be self-paced and open-for-all to help in the overall upskilling of students. We also partner with financial education and training firms for free and discounted access to courses.
- 6. Aggregated Learning Resources Archive We aggregate all our learning material as well as important case books, research reports and other publicly available resources in an archive. The archive is accessible online free-of-cost and is constantly updated with newly added resources.

Financial Software Solutions and Technical Services

FinClub's technical team provides financial software solutions and technical services including virtual trading, financial calculators, market analytics, algo backtesting, data feeds and more.

- 1. Infinity Trader (Virtual Multi-Segment Trading Platform for Indian & Global Markets) The Infinity Trader platform, currently under development, will provide multi-segment virtual trading solutions for 7 global markets (India, USA, UK, Canada, Germany, Japan, Singapore). This platform can also be used for maintaining student-run portfolios and hosting mock trading contests.
- 2. Financial Calculators (Collection of Multi-purpose Financial Calculators) This is a collection of multi-purpose financial calculators currently under development. It will have calculators for finance and investment, loan and mortgage, retirement planning, stock analysis and more.
- **3. FinLabs (Financial Markets Information Centre and Analytics Software) -** The FinLabs platform, currently under development, will provide a one-stop solution for all financial markets information and integrated analytics tools for analysing market data, news and sentiment.
- 4. Infinity Data (Stock Market Historical Data and Live Data Feeds) The Infinity Data platform, currently under development, will provide access to historical market data over 16 years as well as live API calls for accessing low-delay market data for 7 global markets.
- 5. Tradestone Library (Trading Algorithm Backtesting and Visualization Library) The Tradestone Library is a Java library with tools to backtest algorithmic investment and trading strategies over historical market data and generate easy-to-read visuals for efficient strategy analysis.

Live Projects and Consultancy Services

FinClub's Social Impact, Consulting and Analytics teams work hand-in-hand to provide market research and consultancy services to social impact and corporate clients.

1. Live Market Research, Consulting and Analytics Projects - We conduct free open-for-all online courses with live market research, consulting and analytics projects in collaboration with industry partners and student-focused consultancy firms.

- 2. Pro-bono Consultancy Services for Social Impact Firms We provide pro-bono consultancy, market research, financial modeling & strategy planning services for social impact firms. Our pro-bono consultancy services for social impact firms supplements our social responsibility initiatives like conducting literacy missions in collaboration with regional NGOs.
- **3. Low-cost Consultancy Services for Small Businesses -** We provide low-cost consultancy, market research, financial modeling & strategy planning services for local and/or small businesses as well as corporate entities like startups and PE/VC firms.

Partnerships and Collaborations

FinClub regularly partners with multiple organizations and collaborates with other clubs and societies to provide the best available resources and experience to our members and clients.

- 1. Corporate Partnerships with Financial Education and Training Firms Finclub partners with financial education and training firms on a regular basis for free and discounted access to premium learning material and live projects as well as for event sponsorships. To discuss a potential partnership, get in touch with us by visiting our Partners and Collabs page finclubju.com/about/partners-and-collabs or drop a mail at finclubju@gmail.com.
- 2. Club-to-club Collaborations with External Clubs and Societies FinClub collaborates with finance clubs, finance and investment cells, consulting and analytics clubs, business clubs and related student organizations in other colleges on a regular basis for access to a broader pool of learning resources as well as promotion of club events in other colleges.

FY23 Event Reports

Webinar on "Data Science and Machine Learning in the Financial Services Industry"

By Mr. Biswajit Saha (JU 2008-12), Asst. Vice-President at JP Morgan Chase & Co.

13th March, 2022 - Online



Excerpt - "The world is one big data problem. FinClub JU welcomes Mr. Biswajit Saha, Assistant Vice President at JP Morgan Chase & Co, for a talk session on Data Science & ML in the Financial Services Industry."

Bootcamp on "Financial Literacy" in collaboration with Habitat By Mr. Prayas Gupta, Co-Founder and Head of Growth at Habitat 20th April, 2022 - Online



Excerpt - "We are happy to announce our collaboration with Habitat, a social engagement platform for our upcoming session on Financial Literacy. Mr. Prayas Gupta, co-founder of Habitat will be taking a case session on Finance on 20th April, 2022 from 7PM."

Webinar on "Introduction to the World of Consulting"

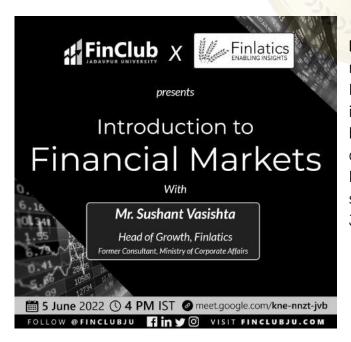
By Mr. Sinchan Banerjee (JU 2001-05), Director - Capital Markets at KPMG UK

24th April, 2022 - Online



Excerpt - "The key to all of life is understanding how to add value to others. Everyone must have heard this renowned quote but only a few know that it refers to the important role played by management consulting companies in protecting clients, adding value to their businesses and helping them achieve their dreams. FinClub is back with an interactive session on Introduction to the World of Consulting and Insights of working in Management Consulting, with Mr. Sinchan Banerjee, Director, KPMG UK."

Webinar on "Introduction to <mark>Financial Markets" in collaborat</mark>ion with Finlatics By Mr. Sushant Vasistha, Head of Growth at Finlatics, ex-Consultant at MoCA 5th June, 2022 - Online



Excerpt - "An important key to investing is to remember that stocks are not lottery tickets. - Peter Lynch. FinClub JU is delighted to announce an interactive session on Introduction to Financial Markets by Mr. Sushant Vasishta, Head of Growth, Finlatics, and our collaboration with Finlatics in bringing the Financial Markets Experience Program, a live project that helps students gain work experience in equity markets, to Jadavpur University students."

Bootcamp on "Financial Literacy to prosper in India" in collaboration with Finurja

By Mr. Shivank Sharma, Co-Founder at Finurja, Financial Risk Manager

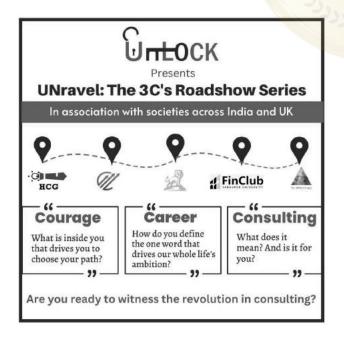
31st July, 2022 - Online



Excerpt - "Bank account, savings, Ioan, interest, fixed deposit, salary, allowance, tax, insurance, mutual funds, SIP, ETF, financial independence ... personal finance is not so simple after all. In today's world, financial literacy is a necessity, not an option. FinClub JU in collaboration with Finurja presents Financial Literacy Bootcamp to prosper in India with Mr. Shivank Sharma (Co-founder, Finurja and Financial Risk Manager), a free workshop with certificates for all participants."

"Unravel - The 3C's Roadshow Series" in collaboration with Unlock Consultancy

By Ms. Ria Walia, Strategy and M&A Consulting Analyst at Monitor Deloitte 29th October, 2022 - Online



Excerpt - "FinClub JU is delighted to announce an interactive session on Consulting in collaboration with Unlock Consultancy for UNravel - The 3C's Roadshow Series. What is inside you that drives you to choose your path? Courage. How do you define the one word that drives our whole life's ambition? Career. What does Consulting mean? And is it for you?"

Finance Club Freshers Orientation Program 2022

By FinClub Core Team **30th October, 2022 - Online**



Excerpt - "Hello Freshers! We are delighted to invite you all to attend the FinClub Freshers' Orientation Program on Sunday, 30th October 2022 at 7 PM! In today's world, financial literacy is a necessity, not an option. FinClub brings you informative webinars and interactive sessions with alumni and professionals throughout the year. What's happening in the world of business and finance? Our finance blog brings you insightful articles which cut through the complicated jargon. The show goes on for more exciting events like mock trading, monopoly and blogging contests are awaiting you in the coming months. Mark your calendars for an interactive session with Team FinClub!"

Exclusive Workshop on "Investment Fundamentals"

By FinClub Core Team

19th December, 2022 - G. C. Se<mark>n Memorial Hall, Production Eng</mark>ineering Dept.



Excerpt - "In trading, you have to be defensive and aggressive at the same time. If you are not aggressive, you are not going to make money, and if you are not defensive, you are not going to keep the money. FinClub JU is delighted to invite everyone to an informative session on Investment Fundamentals. Join the session on 19th December and grab the opportunity to learn a skill that can take you places!"

Industry Workshop on "Mastering the Basics of Investment Banking - From Market Simulation to Securing a Career in Finance for Technology Students" in collaboration with FMI Online

By Ms. Niti Jain, Director at FMI Online **25th January, 2023 - Online**



Excerpt - "Greetings from Finance Club, Jadavpur University! We are delighted to announce our partnership with FMI Online and invite you to an exclusive industry-level workshop on Mastering the Basics of Investment Banking: From Market Simulation to Securing a Career in Finance with Niti Jain, Director of FMI, drawing on over 15 years of experience with a number of banks and institutions. This exclusive workshop will cover topics ranging from an overview of investment banking and financial services industries and the top banks to boosting career opportunities in finance, followed by an exclusive market-making simulation with 50-100% scholarships on London Institute of Banking & Finance accredited learning pathways to all the students attending the workshop."

Seminar on "Introduction to Management Consulting and Finance" By Mr. Manab Majumdar (JU 2010-24), Management Consultant at Accenture 3rd February, 2023 - PG Seminar Hall, Mechanical Engineering Dept.



Excerpt - "Greetings from Finance Club, Jadavpur University! We are proud to announce that Mr. Manab Majumdar, alumnus of JU 2014 batch, will visit the Jadavpur campus on this Friday, 3rd February 2023 for a student interaction session and seminar on Introduction to Management Consulting and Finance. Mr. Majumdar is a Management Consultant at Accenture. He is a certified Financial Risk Manager (FRM) and has previously worked at Deloitte and Oracle. This session is a must-attend for anyone who is looking to explore career options in consulting and finance."

F.E.T.S.U. presents SRIJAN 2023 - "Beat The Market" Virtual Trading Contest with Finlatics

By FinClub Core Team and SRIJAN 2023 Organizing Committee **13th to 16th April, 2023 - Online and S. L. Campus**



Excerpt - "Finance Club, Jadavpur University presents Beat the Market: The Virtual Trading Contest in association with Finlatics. If you are a Finance Enthusiast and want to try your hands in the world of stock trading, then this is your chance. The contest will be held on the Finlatics platform. You trade during the market trading hours with real-time price feeds with a virtual portfolio of INR 10 Lakhs. Bring your best stock trading acumen and compete with real players to win exciting rewards."

F.E.T.S.U. presents SRIJAN 2023 - "Capital Clash" Equity Research Challenge with FMI Online

By FinClub Core Team and SRIJAN 2023 Organizing Committee 13th to 16th April, 2023 - Online and S. L. Campus



Excerpt - "Finance Club, Jadavpur University brings you Fmi.online presents Equity Research (ERC). the first edition of Challenge а research-based case study competition inside the premises of Jadavpur University that would involve the analysis of a company belonging to a particular sector. The competition will test your financial acumen, analytical skills, and business knowledge in two consecutive rounds. What are you waiting for? Hop in and enjoy showing off your analytical prowess to everyone and bag exclusive gifts and prizes worth 40k."

FY24 Recruitment Drive Application Rules and Guidelines

FinClub's multi-tier management team works round the year, brainstorming new ideas, improving existing systems and solving problems to ensure organizational excellence. We believe every member on our team is an asset to the team as a whole.

We invite applications for the posts of (1) <u>Senior Coordinator</u>, (2) <u>Senior Analyst</u>, (3) <u>Coordinator</u>, and (4) <u>Analyst</u>, through our online Recruitment Portal during our Annual Recruitment Drive. Selections are done from interested candidates on the basis of availability and merit judged by Aptitude and Interview rounds conducted by the Core Team.

If you are interested in applying for any role within the FinClub team, make sure you read this entire Activity Report and you have an understanding of FinClub's mission and vision, teams and work structure, planned services and last year's events.

For FY24 recruitments, you can apply for posts (1) and (2) if you are currently in your 3rd year of study or above and you will not graduate for at least 1 year, and you can apply for posts (3) and (4) if you are currently in your 1st or 2nd year of study.

To apply for a post, fill the application form online at <u>finclubju.com/apply</u>.

Once we close applications, you will be informed about the next steps, which will include an Aptitude Test and an Interview with former or senior Core Team members, both of which will be conducted online.

If you are selected for any post, you will join the FinClub team as a trainee for 1 month during which you will receive all necessary training, and after which your post will be finalized for FY24.



