Job Description for Investment / Product Research Trainee

About Our Company Wealth.ppfas.com	**PPFAS Wealth** is a division of Parag Parikh Financial Advisory Services Limited (PPFAS). PPFAS was founded - by Mr. Parag Parikh - on the core values of transparency, effective communication, the 'Law of the Farm', and a client-first approach. Our Core approach is being the "Financial Doctors", prioritizing the client-centric strategy over a product-centric one to assess overall financial positions to prescribe the most suitable solutions, ensuring recommendations based on their needs rather than a specific product. Additionally, we also aim to provide solutions that are simple to explain and implement, enhancing client understanding and engagement.
Job Summary	We are looking for a motivated and detail-oriented **fresher** to join our Research & Advisory team. This role is ideal for someone with a strong interest in investments, a long-term mindset, and a desire to build a career in wealth management and investment advisory.
Roles & Responsibilities	• Assist in research and evaluation of financial products such as Mutual Funds, PMS, AIFs, and Debt Instruments as well as Direct Equities. • Conduct basic to intermediate research on different asset classes, product structures, and market developments. • Study and understand investment styles and strategies of various fund managers. • Track industry trends, regulatory changes, and economic developments and summarize their potential impact on portfolios. • Help prepare research notes, presentations, and investment summaries with logical reasoning and clarity. • Support management on specific research assignments as and when required. • Assist in equity research and tracking, including: • Understanding business models • Basic financial analysis • Supporting fair value assessment of domestic and global companies
Candidate Desirability	• **Education: minimum CFA Level 1 qualified**. • **Experience-0–1 year (Freshers with relevant internships, articleship, or research exposure are welcome)** • Basic knowledge / willingness to learn: • Mutual Funds, PMS, AIFs, and Debt Instruments • Direct & Indirect Taxation concepts • Listed Equities, REITs, and InvITs **Skills & Attributes** • Strong analytical and logical thinking • Interest in long-term investing and wealth creation

	• Good written and verbal communication skills • High attention to detail and structured approach to work • Ability to work independently, take initiative, and learn quickly • Curious mindset with a passion for financial markets • Can Multitask effectively • Self starters
Job Location	Mumbai - Nariman Point
Disclaimer	As per extant rules in place an employee of PPFAS Wealth his spouse, his dependent children and dependent parents are not permitted to trade in shares and securities (primary & secondary market) once they join PPFAS. Failure to comply with these instructions can result in termination of service.