

Poojan Patel

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EDUCATION

University of Massachusetts - Boston Expected May 2026
Ph.D. in Business Administration - Finance Track

Stevens Institute of Technology 2021 - 2022
M.S. in Financial Engineering

SVKM's NMIMS University 2016 - 2021
MBA in Technology Management
Bachelors of Technology in Computer Engineering

TEACHING EXPERIENCE

Bryant University

- **Visiting Assistant Professor of Finance**

- **Spring 2026** - FIN 201 Financial Management (2 Sections) ; FIN 466 Data Analysis for Finance

- **Fall 2025** - FIN 201 Financial Management (2 Sections) ; FIN 466 Data Analysis for Finance

University of Massachusetts at Boston

- **Principal Instructor - Course Evaluation (4.5/5)**

- **Spring 2025** - MBA AF 632 - Asset Management Practicum

- **Teaching Assistant**

- **Fall 2022 to Fall 2024** - MBA AF 632 - Asset Management Practicum

RESEARCH

Research Interest

Gen AI, Corporate Disclosures, Media & Finance, Corporate Finance

Publications

- *Agueboh, E. S., Onuoha, U. C., & Patel, P. (2026). Assessing the relevance of sell-side analyst recommendations. Review of Financial Economics, 44(1), e70015.*

Books

- **Prompt Engineering for Accounting and Finance**
Co-authors: Sunil Kumar, Atreya Chakraborty, Poojan Patel
Publisher : Palgrave Macmillan. (Forthcoming).

AWARDS & RECOGNITIONS

- **Runner-up, Student Managed Fund Competition**
UMass Foundation (2026), UMass Foundation (2025)
- **Ph.D. Academic Excellence in Finance**
University of Massachusetts Boston (2024)
- **Student Spotlight**
College of Management, University of Massachusetts Boston (2023)
- **Dean's Scholarship**
University of Massachusetts Boston (2022 – 2026)

SERVICE TO THE PROFESSION

- **Manuscript Reviewer & Program Committee**
 - Reviewer for Post Communist Economies Journal (2025), The Eastern Finance Association-Annual Meeting (2025), The Journal of Entrepreneurial Finance, FMA Annual Meeting (2025), SFA Annual Meeting (2025), FMA Applied Finance Conference (2025),
 - 3rd International Conference on CSR (2023)
- **Guest Lecturer- Center for Collaborative Leadership at UMass Boston(2025)**
 - Lecture on AI and cross-functional collaboration in organizations to mid-level managers, highlighting strategies for leveraging generative AI to bridge knowledge silos and enhance team decision-making.
- **Conference Organizing Committee Member**
 - Organising Committee of Third Conference on CSR organized by UMass Boston and EM Normandie (2023). Theme: Measurement and Impact of ESG as a business strategy driver
- **Discussant**
 - MRS International Risk Conference (2025) Global Finance Conference (2025), Gen AI Conference by Journal of Banking and Finance(2024), Brown Bag Seminar at UMass Boston(2025,2024)
- **Bloomberg Bootcamp Instructor**
 - Chelsea High School Students at UMass Boston (2024), ESG-focused Bloomberg Bootcamp for Graduate Students(2024), UMass Boston Undergraduate Student Managed Fund

LEADERSHIP & EXTRACURRICULAR ACTIVITIES

- **Portfolio Manager of UMass Boston Graduate Student Managed Fund**
 - Leading and Managing Graduate Student Managed Fund at UMass Boston with a portfolio size of \$270K
- **President and Founder, UMB Investment Club**
University of Massachusetts Boston (January 2023 – Present)
 - Led club initiatives to enhance financial literacy and investment knowledge among students, organized workshops and speaker events featuring finance professionals and managed investment simulations and hands-on trading activities for members.
- **Chairperson, IEEE NMIMS**
Narsee Monjee Institute of Management Studies (July 2019 – August 2020)