**Akshay**

E-Mail: [akshay.380032@2freemail.com](mailto:akshay.380032@2freemail.com)

To be potential resource to the organization where I can use all my skills and knowledge which would help organization to grow and further enhance my growth profile.

**CORE COMPETENCES**

|  |  |
| --- | --- |
| * *Derivatives* * *Micro and Macroeconomics* * *International Trade & Procedures* * *Commodity Trading* * *Exotics Derivatives Instruments* * *Security Analysis* | * *Capital Markets* * *Industry and Company Analysis* * *Commodities Markets* * *Foreign Exchange Markets* * *Organizational Behavior & Culture* * *Option Strategies* |

**PROFESSIONAL EXPERIENCE**

**Assistant Manager** (Nov 2016 - Present)

HDFC Securities, Khar, Mumbai

**Key deliverables:**

* Advising HNI Clients on stocks/shares and generating revenue.
* Advising Clients on Insurance, Fixed deposit, equity & mutual fund investment .
* Placing order on behalf of clients in Cash, F&O & currency segment with proficiency, accuracy and confirm the same on recording line.
* Recommending the customers on various advisory house calls.
* Daily checking debit, credit in to client’s ledger & making tally of the same.
* Maintaining daily CRM by calling on set of given clients.
* Convincing clients for Mutual fund or stocks systematic investment plan for their long term perspective .
* Visiting hdfc bank branches for new customers
* Meeting with clients for downloading mobile application and quick training on how to place orders.
* Attending walkin customers queries
* Updating contact details, proxy for placing orders & currency segment activation.

**Relationship Manager (Emp code-NB04879)** (Jan-2015 - April 2015)

Nirmal Bang Securities Pvt Ltd -Malad (East), Mumbai

**Key deliverables:**

* Communicating intraday trading calls and investing ideas to customers. Monitoring day to day operations.
* Opening Demat Account. Maintaining regular relations with clients.
* Advised the clients from time to time based on the research advices, generating brokerage and volume to the Branch. Expand the Client Base by appointing various new clients.
* Trade for the clients, keeping them informed about rates, research information, and market outlook, order & trade details and confirmations.
* Identify and develop new streams for equity revenue growth and maintaining cordial relationship with existing clients.
* Developing Relationship with HNI clients and Generating leads through References.
* Achieve laid down budgets w.r.t revenue generation and client activation.

**Investment Advisor (Emp. code -E43538)** (May 2012 - May 2013)

Angel Broking Pvt Ltd -Andheri(East), Mumbai

**Key deliverables:**

* HNI client acquisition, equity advisory and dealing
* Improve business generation from new and existing clients
* Promoting and selling financial products to meet given sales targets
* Sending advises to all the backdated, current date Trades, to keep the client informed for all trades in Equities . Customer follow up and administrative tasks.
* Contacting clients and setting up meetings, at office environment or as per their suggestion
* analyzing information and preparing plans best suited to individual client's requirements
* Contacting clients with news of new financial products or changes in financial sector and macroeconomic datas that may affect their savings and investments.
* Establish a network of referrals . Build a healthy and long-term relationship with clients .

**Commodity Market Dealer** (May2011 - Nov2011)

Bansal Finstock Pvt Ltd-Kandivali(West), Mumbai

**Key Deliverables:**

* Build rapport with the clients and maintain good relationship with them.Coordinate with the back office.
* Regularly monitor risk levels of the clients.Update Client about their Position / MTM in Market.
* Recommend the customers on various advisory in-house calls and activate old clients.

**Equity and Derivatives Dealer** (July 2010 - Dec 2010)

Karmic Stock Broking Pvt Ltd-Malad(West), Mumbai

**Key Deliverables:**

* Front office activities. Dealing in equity, derivatives products. Servicing the existing clients.
* Updating files, software before market opens.Trade modification
* Timely communication of orders and trade confirmations to the concerned.
* Attending queries of customers. Respond to client questions and requests.

**EDUCATION**

**Bachelor of Finance Management (BFM)**

Nagindas Khandwala College of Commerce, Arts Management Studies, Malad(west), Mumbai.

University of Mumbai.

**CERTIFICATION**

* NISM series I : Currency Derivatives
* NISM series VIII : Equity Derivatives
* NISM series XV : Research analyst
* NCFM Module : Financial Markets: A Beginner's Module
* NCFM Module : Capital Market (Dealers) Module
* Senior school certificate examination in the vocational course ‘Financial Market Management’ conducted by National Stock Exchange.
* Certified in computer hardware & networking MS-CIT Maharashtra state certificate in information technology.

**IT SKILLS**

* Technical Expertise: HTML, C,Computer Hardware & Networking ,trade terminals ODIN, NOW
* Operating Systems: Windows 98/2000/NT/XP/Vista/7/8
* Software: MS Office Suite (Excel, Word, PowerPoint)
* Languages: English,Hindi,Gujarati,Marathi.
* Attended seminars on Risk management, commodities, currency and options strategies by Angel broking Pvt. Ltd and city meetup groups.
* Successfully cleared the career progression plan at Angel broking pvt.ltd.
* Participate in various panel discussion at Indian Merchants Chamber (IMC)

**PERSONAL DETAILS**

Date of Birth : 23 Nov 1991

Nationality : Indian

Marital Status : Single

Languages Known : English, Hindi, Marathi, Gujarati