

Jai Shankar

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PROFESSIONAL SUMMARY

Results-driven MBA (Finance) graduate with practical experience in financial services, loan operations, customer acquisition, and portfolio management. Proficient in MS Excel, investment analysis, and credit assessment, with strong leadership, problem-solving, and decision-making skills. Committed to delivering growth, enhancing customer experience, and supporting financial excellence.

EDUCATION

Chandigarh University

Master of Business Administration

Mohali, Punjab

Aug 2022 – May 2024

Magadh University,

Bachelor in B.com (Hons.)

Bodh Gaya, Bihar

May 2017 – Sep 2020

EXPERIENCE

Shriram Finance Ltd,

Management Trainee

Delhi

Sep 2024 – July 2025

- Engaged in customer handling and loan processing across business, two-wheeler, and gold loan segments.
- Achieved business acquisition targets by visiting dealer points and conducting customer visits.
- Actively involved in collections management and recovery follow-ups to ensure portfolio quality
- Conducted marketing and promotional activities to enhance visibility and growth in the gold loan segment.
- Effectively cross-sold Fixed Deposits (FDs) and SLIC insurance products, contributing to revenue enhancement.
- Acquired practical experience in customer relationship management, credit assessment, and field sales operations.
- Successfully generated consistent business volume over a 6-month period, gaining valuable concepts and improving interpersonal and negotiation skills.

Shriram Finance Ltd,

Finance Intern

Gurgaon

June 2023 – July 2023

- Assisted customers throughout the loan application process, ensuring a smooth and efficient Experience.
- Developed a proactive approach to problem-solving and decision-making, enhancing the efficiency of the lending Process.
- Assisted in maintaining accurate records and documentation related to customer interactions and Loan applications
- Worked collaboratively with the finance team to ensure compliance with regulatory requirements and company policies.

CERTIFICATIONS

- Data Driven Decision Making / **PWC**
- Excel Fundamental - Formula for Finance / **Corporate Finance Institute**
- Accounting Fundamental / **Corporate Finance Institute**

ACHIEVEMENTS

- Participation in Economic Times Quiz
- Annual All India GK Test Certificate (United Schools Org. of India)
- Gold Medal in 4*100 Relay Race
- Inter-School Champion in Football Tournament

PROJECT

- **Industry Immersion Project/ Chandigarh University**
Topic – Study on Customer Retention Strategies adopted by HDFC Bank *Feb 2024 – April 2024*

SKILLS - SET

- **Technical Skills:** MS Excel, Investment Management, Fundamental & Technical Analysis
- **Interpersonal Skills:** Team Leadership, Task Management, Problem Solving, Decision Making