

AKSHAY SAINI

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Presently engaged as an Excellence Executive at Bajaj Capital, specializing in seamless client onboarding, KYC compliance, and investment advisory with a focus on mutual funds and SIPs. Additionally, possess substantial experience in stock trading, including Futures & Options (F&O) and currency markets, complemented by strong skills in financial planning.

EXPERIENCE

[August 2024] – [April 2025]

Customer Excellence Executive, Bajaj Capital Ins. Broking Ltd.

As an Excellence Executive in the Digital Transformation Team at Bajaj Capital, I specialize in delivering seamless client onboarding and investment solutions. My role is centered on ensuring an efficient and client-centric experience through the following key responsibilities:

- Conducting client engagements via calls to facilitate smooth onboarding on the investment platform.
- Guiding clients through the KYC (Know Your Customer) process to ensure successful account activation.
- Assisting clients in executing investments in Mutual Funds (MF) and Systematic Investment Plans (SIP).
- Effectively addressing client queries and coordinating with backend teams to resolve technical issues.
- Collaborating with Relationship Managers (RMs) to identify app-related challenges and escalating these to relevant teams for prompt resolution.
- Streamlining processes to enhance client satisfaction and drive investment success.

EDUCATION

[July 2019 - August 2022]

Bachelor's of Commerce, University of Delhi

Grade: 7.697 CGPA

[March 2019]

HSC, CBSE

Grade: 70 %

[March 2017]

SSC, CBSE

Grade: 9.6 CGPA

SKILLS

KYC and Compliance Procedures
Customer Due Diligence (CDD)
Risk Assessment and Management
Proficiency in MS – Excel and Word
Proficiency in Jira

Client Relationship Management
Strong Verbal and Written Communication Skills
Analytical Thinking
Problem Solving
Banking and Financial Markets Knowledge