

Objective

My goal is to become associated with a company where I can utilize my skills and gain further experience while enhancing the company's productivity and reputation.

Experience

- **Anand Rathi Investment Services** **Aug 2025 - Present**
Associate /Relationship Manager
 - Assisted in equity and mutual fund analysis, including performance tracking, risk-return comparison, and portfolio review
 - Supported wealth management operations by preparing MIS reports, client portfolios, and investment summaries.
 - Tracked market trends, corporate actions, dividends, and NAV movements to support investment decision-making
 - Handled client queries related to investment products, portfolio performance, and transaction status
 - Gained basic exposure to cryptocurrency markets as part of overall capital market tracking
 - Assisted in portfolio performance tracking where crypto was included as a small asset allocation

- **ICICI Securities Ltd.(Group company of ICICI Bank Ltd.)** **23-01-2023 - 15-07-2025**
Equity Relationship Manager
 - Conducted basic market and sector research on equities, mutual funds, and ETFs for internal use
 - Coordinated with Relationship Managers and advisory teams to ensure smooth execution of investment transactions
 - Assisted in trade-related backend support, reconciliation, and reporting activities
 - Monitored major cryptocurrencies (Bitcoin, Ethereum) for price movement and market sentiment analysis
 - Prepared basic market updates on crypto alongside equities, mutual funds, and ETFs for internal reference
 - Prepared daily/weekly performance reports and market updates for clients and internal stakeholders
 - Ensured compliance with internal processes and basic SEBI/NISM guidelines in client servicing
 - Executing Trades in equity, Mutual Fund and ETFs on behalf of Client.

Education

- **Babu shivnath Agrawal College Mathura(BSA)** **2020**
B.Com
- **Noida Institute of engineering and technology (AKTU)** **2023**
MBA(Finance)

Skills

- *Equity markets & investment products
- *Mutual funds, ETFs & NAV analysis
- *Basic understanding of corporate actions & dividends
- *Portfolio performance & risk analysis
- *Market trend tracking & research

Certifications.

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- NISM VIII: Equity and derivatives certificate
- Corporate Agent Composite (IC38) – IRDAI.

Computer Proficiency

- MS WORD
- MS EXCEL
- MS OFFICE

