

## CAREER OBJECTIVES

To leverage my financial knowledge and problem-solving skills in a dynamic role within the finance industry, contributing to organizational growth through effective financial planning and analysis while continuously developing my technical expertise and professional competencies.

## ACADEMICS

| Degree                        | University/ College                      | Year      | Percentage / CGPA |
|-------------------------------|--|-----------|-------------------|
| PGDM (Finance)                | ISMS Sankalp Business School, Pune       | 2024-2026 | 8.48 (CGPA)       |
| Bachelors in Commerce (B.COM) | Chaudhary Charan Singh university Meerut | 2020-2023 | 65.38%            |
| HSC                           | Konark Vidyapeeth Khekra (Baghpat)       | 2020      | 85%               |
| SSC                           | Konark Vidyapeeth Khekra (Baghpat)       | 2018      | 73%               |

## EXPERIENCE

**Company:** Bajaj Broking

**Duration:** 1<sup>st</sup> April 2025 - 30<sup>th</sup> June 2025

### Description:

- Assisted customers in opening Demat accounts and ensured smooth onboarding.
- Verified KYC documents and maintained compliance during account opening.
- Explained Bajaj Broking's trading platforms and investment features to clients.
- Guided customers in adopting digital platforms for trading and transactions.
- Conducted client interactions and field visits to create awareness about financial products.
- Supported the sales team in generating leads and converting prospects into active clients.



## Abhishek Tyagi

### CONTACT

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### LANGUAGES

- English
- Hindi

### SKILLS

#### Technical Skills

- Ms Office
- Data interpretation & Reporting
- Accounting Fundamental

#### Behavioural Skills

- Analytical thinking
- Time Management
- Adaptability
- Team Work

# PROJECT

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**Company:** Bajaj broking

**Project Title** Emerging Technology in Sales & Marketing for Customer Acquisition.

**Description:**

- Conducted a structured study on sales and marketing strategies in the Indian broking sector, with a focus on customer acquisition practices at Bajaj Broking.
- Designed and analyzed a survey of 50 respondents to evaluate customer demographics, onboarding experience, and platform usability.
- Benchmarked Bajaj Broking against leading digital brokers (Zerodha, Groww, Upstox) and proposed recommendations such as AI-based KYC, lead scoring, and gamified referral programs.

## CERTIFICATIONS / ACHIEVEMENTS

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- Certified in NISM (SEBI Certification) – 2025
- Certified in Excel for Beginners by Davidson College (edX) – 2025
- Certified in Illuminate Entrepreneurship Workshop, IIT Bombay – 2024

## EXTRA CURRICULAR ACTIVITIES

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- Co-Ordinator of Sports event at Chaudhary Charan Singh University .
- Planned and Organized finance club activity at ISMS.
- Leader in CSR group activity.

## HOBBIES

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- Travelling
- Playing cricket
- Listening to music
- Watching movie

## DECLARATION

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I hereby declare that all the information provided in this curriculum vitae is true, correct, and complete to the best of my knowledge and belief. I take full responsibility for the accuracy of the details mentioned above

**DATE**

**NAME AND SIGN**