

NAKUL MAHESHWARI

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PROFILE

Institutional Sales and Channel Management professional, with over 12 years' experience in Financial Services Industry; managing key stakeholders in all the following areas:

- Leading New Business Acquisition
- Managing Senior Executive Client Engagements
- Developing and Implementing New Business Strategies
- Identifying Target Markets
- Facilitating Strategic Partnerships

PROFESSIONAL STRENGTHS

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|------------------------|---------------------------------|--------------------------|
| ■ Revenue Generation | ■ Regional P&L Responsibilities | ■ Product Development |
| ■ Investment Placement | ■ Executive Presentations | ■ Risk/Scenario Analysis |
| ■ Fund Marketing | ■ Private Banking | ■ Asset Allocation |

PROFESSIONAL EXPERIENCE

Vice President- Distribution and Institutional Sales

Sep 2010 – Till present

Kotak Mahindra (UK) Limited, Dubai, UAE

International subsidiary of India's financial conglomerate, Kotak Mahindra Bank Ltd.; Provides India-Centric asset management services and institutional structures to overseas investors seeking to invest in India.

Responsible for developing and implementing sales strategy and tactical business plan for raising incremental assets and brokerage revenue from the Middle East and Africa region

- Building and developing relationships with Sovereigns, pension funds, private banks, fund platforms, institutions and family offices across the geographical region to identify business opportunities.
- Retaining and expanding revenue streams whilst ensuring delivery against agreed business plans for the client and product.
- Identify and acquire new clients and work closely with other departments while focusing on institutional mandates and distribution strategy.
- Building a wide distribution network across the region for the full range of investment, broking and structured products offered by KMUK.
- Closely involved in structuring of investment vehicles/ products, and raising assets for Fixed Maturity Plans and Leveraged Fixed Maturity Plans.
- Continue to leverage extensive wealth management experience by providing guidance to Africa Based UHNW investors and assist in underwriting new product ideas.
- Complying with regulatory requirements of DFSA, FCA and SEBI.

Achievements:

- Consistently raising more than USD 100 million of assets under management year on year, across debt and equity funds and generating revenues in excess of USD 2 million per year.
- Expanded KMUK's market penetration in Kenya and Mauritius, promoting the brand and investment strategy beyond its traditional markets
- Won Equity and Debt Mandates from African Institutions and UHNWs.
- Successfully launched and raised assets in customized debt funds.

Territory Manager**Sep 2008 – Sep 2010**

Reliance Capital Asset Management Limited, Dubai, UAE

One of the largest asset management companies of India, part of Reliance Anil Dhirubhai Ambani Group

- Responsible for business development for all lines of business-both Institutional & Individual - through Intermediaries in UAE, Bahrain and Kuwait.
- Interface with the Distributors & developed short to long term strategies to ensure market share & growth in the assigned market.
- Identified strategic partnerships, planned strategic brand-building events and gathered market information to gain a competitive advantage
- Generated business development awareness by implementing in-depth sales and marketing training programs to expand the product penetration
- Trained and developed the intermediary sales force in investment related issues resulting in new business in first year and consistent growth in subsequent year.
- Developed and implemented strategy for Banking Channels, Brokers & Consultants and involved various internal support departments for change management

Achievements:

- Achieved a turnaround increase in local Assets under Management (AUM) by more than 150 % (From US\$ 30 Mn to US\$ 75 Mn) within a 1.5-year span.
- Developed and implemented a targeted marketing program focused on NRI investors with established allocations to the event driven sector for the purpose of diversifying the investor base away from “hot money” investors.
- Conceived and implemented pioneering strategies in fortifying distribution relationships; spearheaded individualized trainings of 50 channel partners and organized roadshow attended by more than 300 key distributors/channel partners.
- Garnered more than USD 20 million in new fund offer of Reliance Emergent India Fund in April-May 2010.

Unit Manager**Sep 2006 – Sep 2008**

HDFC Bank Ltd, Dubai, UAE

Amongst the largest banks of India with key focus on wholesale banking, retail banking and treasury services

- Promoted to level of Unit Manager in Feb 08 from Relationship Manager to achieve sales objectives by implementing Sales strategy: Recruit, Supervise and lead a team of RMs
- Directed a team of 6 Relationship Managers to forecast and set sales goals. Provided focus on the individual skills and needs of each Relationship Manager, while executing an individual strategy for each.
- As one of the first recruit for the JV of Bank Muscat and Erstwhile Centurion Bank of Punjab, spearheaded the launch of premium segment NRI (Non-Resident Indian) Services in Dubai
- Conceptualized and implemented marketing strategies with a view to penetrate market, new accounts acquisitions & business expansion with wide range of financial products / services
- Identified specialized customer segments (High Net worth Doctors, Media Professionals, Interior Decorators and the likes) and pioneered customized promotions and referral process to rapidly capture market share in these niches’.
- Cultivated relationships with key players in various industries to create ongoing and mutually beneficial referral systems
- Managed a \$ 50+ Million book of about 100 clients, providing a spectrum of financial products & services – Deposits, Managed accounts, private equity, fixed income & equities included.

Achievements:

- As a Unit Manager achieved record average revenue of US\$ 20,000 per Relationship Manager for the quarter.
- Amongst the top Relationship Manager in the Bank under Mutual Fund Sales category (FY 07).
- Closed a record number of Portfolio Management Services (PMS) deals within a 6-month span resulting in US\$ 15 Mn fund allocation.

Relationship Manager**Feb 2006 – Aug 2006**

Standard Chartered Bank, Noida, India

Country's largest international bank with 99 branches in 42 cities

- Handled Investment portfolios of 160 HNI clients while selecting and maintaining superior investment portfolios.
- Monitored clients' portfolio performance, conducted profitability analysis, rendered sustained advisory services for securing high ROI and increasing retention levels.
- Took adequate measures to ensure optimum utilization of surplus funds of HNIs towards the accomplishment of revenue and profitability targets.
- Managed customer centric operations & ensured customer satisfaction by achieving delivery & service quality norms.

Independent Financial Adviser**Jun 2004 – Jan 2006**

Self Employed, Leeds (UK)/Delhi (India)

- Incubated, as a self-starter, Independent Wealth Management Consultancy specializing in the provision of distribution services to Wealth Management, Asset Protection and Investment Management Companies
- Managed more than 50 HNI (High Net worth Individual) Client Relationships with Assets under Management (AUM) in excess of US\$ 15 Mn and promoted financial planning services w.r.t. investments across various asset classes.

Manager**Jun 2000 – Aug 2003**

Satyam Paper Corporation, Delhi, India

Paper Trading Company having operations in Northern and Central India

- Conducted sales analysis, channel management and controlled back up/sale or return orders.
- Increased operational efficiency by 15% with annual recurring costs savings in excess of USD 70,000 by implementing ABC method of analysis for streamlining the supply chain.
- Generated revenues in excess of USD 120,000 by locating and establishing relationships with 20+ enterprises pan-India.

EDUCATION**MASTERS IN INTERNATIONAL BUSINESS**

Leeds Business School, U.K. (2004)

BACHELOR IN VOCATIONAL ARTS (Store Management)

Delhi University, India (2000)

ADDITIONAL INFORMATION

Date of Birth	17 th June, 1980
Languages known	English, Hindi
Location preference	May consider relocation