**AMEY SHARAD MASHILKAR**



Mobile: 91-9819670640; E-Mail ID: ameymashilkar@gmail.com; Current City: Mumbai

**MIDDLE MANAGEMENT PROFESSIONAL**

**Business Strategy & Investments**

**PROFILE SUMMARY**

* Associate Vice President – India Infoline Private Ltd. with 8 months of experience in managing investments for HNIs in **Real Estate**, Equity & Fixed Income; Ex. Associate Vice President – Kotak Mahindra Bank Ltd. with **3 years** of experience in **Analytics & Advisory** Functions as well as Client Relations
* Expertise in **Asset Management** – Equity (Mutual Funds, Stocks & PMS), Debt (Govt. & Corp. Bonds) and **Real Estate** **(Real Estate Debentures, Real Estate Funds, Residential & Commercial Property)**
* End-to-end responsibility of driving the **Strategy for portfolios** of Family Office clients with individual asset size of above **5 Million Dollars**; Also a vital contributor to the overall product and **business strategy**
* Excellent Analytical skills with ability to **interpret data & formulate Business Strategy** based on the same
* Instrumental in **acquisitions** of **1000 Million Dollars** across prospects-turned-clients
* **Certified** NISM Investment Adviser(Level 1) & Mutual Fund Distributor and FLIP Certified Finance & Banking Professional
* Solid academic track record with **MBA** from **IIM Bangalore** & B. Tech. (IT) from VJTI

**EMPLOYMENT CHRONICLE**

**Growth Path:**

**Jun’11 – Jul’12:** Kotak Wealth Management, AVP – Client Relations

**Aug’12 – Jul’14:** Kotak Wealth Management, AVP – Portfolio & Investment Advisory

**Mar’15 – Present:** IIFL Private Wealth Management, AVP – Investment Advisory & Fund Manager

**Mar’15 – Present: IIFL Private Wealth Management, India Infoline Private Ltd., Mumbai**

**Noteworthy Contributions:**

**As Associate Vice President – Investment Advisory & Fund Manager**

* Contributed to the **overall strategy** with respect to Equity, Debt and Real Estate
* Pivotal in preparing new pitches for **fresh Acquisitions of 1000 Million Dollars** across clients
* Actively debated and **reasoned out suitability** of products for respective client portfolios **basis Strategy**

**Jun’11 – Jul’14: Kotak Wealth Management, Kotak Mahindra Bank, Mumbai**

**Noteworthy Contributions:**

**As Associate Vice President – Portfolio & Investment Advisory**

* Shouldered responsibility of **full ownership** of portfolios of **20 Family Office clients** of the firm with a combined **asset size of 400 Million Dollars** andindividual investments not less than 5 Million Dollars
* **5** of these clients managed constituted **Top 1%** of the client base
* Pivotal in preparing new pitches for **fresh Acquisitions of 200 Million Dollars** across 12 clients
* **Single-handedly formulated Monthly Newsletter published to Top 20% clients** to provide a summary of market updates & their portfolio
* Functioned as an essential part of a2 member team accountable for **on boarding of MILES, an automated system** to address client MIS & Portfolio Recommendations
* Contributed to the **overall strategy** with respect to Equity, Debt and Real Estate
* Actively debated and **reasoned out suitability** of products for respective client portfolios **basis Strategy**
* Essayed a key role in **interacting with clients** to explain and regularly update the portfolio activity
* **Formulated** and regularly updated the asset allocation plan and investment templates for these clients
* Performed periodic investment **portfolio reviews** including **attribution analysis** & benchmarking

**As Associate Vice President – Client Relations**

* Entrusted with the task of assisting a Senior Banker in managing **10 Million Dollars** across **12 clients**
* **Filtered the investment products** suggested by the Products & Research Team for suitability for clients
* Conducted periodic investment portfolio reviews
* Instrumental in developing **recommendation presentations** & proposals for prospective advisory clients
* Liaised with client servicing & other functions to ensure high service quality to clients

**CERTIFICATIONS**

* 82%, **Finance & Banking Fundamentals** (India), **FLIP** Certified Professional
* 81.25%, **NISM-Series-V-A**: Mutual Fund Distributors Certification Examination
* Participant - Psychology of Investing, by Franklin Templeton Academy
* 65%, **NISM-Series-X-A**: Investment Adviser (Level 1) Certification Examination
* 82.5%, **Macroeconomics** for Financial Markets Module, NSE’s Certification in Financial Markets

**SUMMER INTERNSHIP**

**Apr’10 – Jun’10: Titan Industries Limited – Summer Intern**

**Sales & Marketing:**

* **Achieved best sales ever** of **Rs. 20 Millions** for Nebula Watchesduring Akshay Tritiya offer of 15 days
* Functioned as **single point of contact** for Marketing, Sales & Support teams of Titan, Tanishq and Stores
* **Identified** major target segments and **supervised** earmarked marketing activities across India
* **Monitored** gold coin requirements at CFAs & also **designed effective** incentivesfor Tanishq employees

**Assortment Planning:**

* Successfully **developed and administered questionnaire** to map customer consideration set; Recommended reduction in number of Titan Visual Display Units and also number of active variants

**PROFESSIONAL QUALIFICATIONS**

2011 PGDMfrom **Indian Institute of Management, Bangalore** (**99.79** percentile – Data Interpretation, 99.14 percentile – Overall and 98.27 percentile – Quantitative Aptitude in CAT 2008)

2009 **B.Tech.** – Information Technology from Veermata Jeejabai Technological Institute **(VJTI)**, Mumbai

**ACADEMIC ACCOLADES**

* Holds the distinction of being in the **Top 1%** at State Engineering Entrance Exam among 2 Lakh candidates
* Secured **65th State Rank** and Certificate of Merit & Scholarship in Mathematics Scholarship Exam, 2002
* Among **Top 150 in state** and also received Merit Certificate at Mathematics Pradnya Examination in 2001
* **Represented school in State Level** Mathematics Quiz Contest in 2001; Member of a team of 4
* **Awarded twice Merit Certificate** at Mathematics Sambodh Examination in 1997& 2000
* Bagged **Merit Certificate** in Maths Pravinya Exam in 2001 and was also selected for Maths Pradnya Exam
* Merit of being recognized in the **Top 0.1% amongst 5,00,000** candidates in stateawarded scholarship at High School Scholarship Exam in 2000

**POSITIONS OF RESPONSIBILITY**

* Functioned as:
* **Coordinator** – Performing Arts and **successfully led a team of 100** during Cultural Festival in 2008
* **Event Head** – Costume Designing & Solo Singing Competition during Cultural Festival in 2007
* **Organiser** – Solo Dance during Cultural Festival in 2007
* **Manager** – Hospitality during Technological Festival in 2008
* **Organizer** – Decoration during first ever VJTI Alumni Meet in 2006

**KEY BUSINESS SKILLS**

* **Analytics & Business Intelligence** – Analytical blend of mind with ability to gain insights into data
* **Asset Management –** In-depth understanding of Capital Markets & Real Estate and related investments
* **Customer Relationship Management** – Experience in communicating effectively with the stakeholders
* **Strategy & Planning** – Proven expertise in formulating strategy and implementation of the same

**PERSONAL DETAILS**

Date of Birth: 11th May 1987

Address: Mumbai

**Location Preference: Metros or proximity to any Metro**