



Mr Jeffrey Kariuki W

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Professional Summary:

Accomplished Sales Professional with a strong track record in the Forex industry, combining three years of experience in exceeding sales targets, providing exceptional client support, and delivering informative market commentary. Adept at conducting educational seminars, fostering client relationships, and identifying lucrative opportunities. Proficient in technical analysis and technology, with a keen eye for detail and a commitment to achieving results. Excited about the opportunity to leverage expertise and contribute to a dynamic and innovative environment at Morfin FX as a Business Development Manager.

Work Experience:

Junior Financial Analyst
XA Markets, Deira, Dubai
(Aug 2023 - Present)

Job Responsibilities:

- Conduct research and analysis to write daily market commentary about the forex market and the economic and political issues that affect currency values.
- Provide educational seminars and webinars to help clients and potential clients get more comfortable with forex trading.

- Identify opportunities and risks by examining data to inform investment recommendations or business decisions.
- Produce high-quality content using technical, fundamental, and quantitative analysis to inform opinions. Communicate and present them effectively.
- Establish a media presence to become a trusted source of forex information and promote the employer.
- Have a strong background in economics, international finance, and international politics.

Key Achievements:

- Conducted research and analysis to write daily market commentary that helped clients make informed trading decisions.
- Provided educational seminars and webinars that increased client engagement and retention.
- Identified opportunities and risks that led to profitable investment recommendations and strategic business decisions.

Sales Executive

Scope Markets, Hybrid

(May 2021 - June 2023)

- Collaborated with the sales management team to craft effective sales strategies and tactics that aligned with the company's overarching business objectives.
- Identified and prospected potential clients, including individual traders, financial institutions, and corporate entities, with the aim of expanding the customer base and driving revenue growth.
- Established and maintained enduring client relationships, gaining deep insights into their unique needs, providing tailored solutions, and ensuring unparalleled client satisfaction.
- Demonstrated profound knowledge of the company's forex trading products, services, and platforms, effectively communicating their features and benefits to potential clients.

- Adopted a consultative sales approach to comprehensively understand clients' trading goals and risk tolerance, offering forex trading solutions customized to their precise needs.
- Maintained strict adherence to all relevant regulatory and compliance requirements while interacting with clients and promoting forex trading services.
- Collaborated seamlessly with cross-functional teams, including marketing, customer support, and research, to align efforts and maximize overall company success.

Key Achievements:

- Consistently achieved an impressive monthly sales target of 40% over 18 months, contributing significantly to the company's revenue growth.
- Recognized as the top-performing Telesales Executive for two consecutive quarters, acknowledged for exceptional sales performance.
- Played a pivotal role in conducting informative webinars and workshops for clients, educating them on trading strategies and risk management.
- Proactively forecasted and alerted clients about major market movements, enabling them to capitalize on profitable trading opportunities.
- Forged and maintained enduring client relationships, resulting in increased business and heightened client satisfaction.

Telesales Associate / Junior Trader

Nairobi School of Forex, Nairobi, Kenya

(Aug 2020 - March 2023)

- Promoted trading education programs to individuals keen on advancing their stock and forex trading skills.
- Spearheaded informative webinars and presentations, spotlighting the advantages of the trading school's courses.
- Guided potential students through the enrollment process, addressing inquiries and offering tailored recommendations.
- Collaborated with instructors to craft compelling course content and materials.
- Assisted in the coordination of trading workshops and events, contributing to the growth of the trading school's community.

- Conducted training sessions to enhance the proficiency of junior analysts in technical analysis tools and methodologies.

Digital Content Creator

The African Trader, Remote

(Nairobi, Kenya – Feb 2023 to Present)

- Conducted in-depth social media analytics to gauge the success of campaigns and identify areas for enhancement.
- Established and managed a Discord server while curating content for various social media platforms, including Facebook, Twitter, Instagram, and LinkedIn.
- Created and maintained editorial calendars to ensure the punctual delivery of high-quality content.
- Innovatively integrated bots for automated responses to routine tasks.
- Took on the role of a Discord Moderator and community developer.
- Successfully cultivated a personal brand within the trading and financial market analysis domain, leading to substantial growth in the client base and revenue.
- Formulated and executed effective marketing strategies to bolster my personal brand, encompassing social media campaigns, email marketing, and content creation.
- Conducted meticulous technical analysis of financial markets, facilitating precise predictions and profitable trades.
- Collaborated with industry professionals, including brokers, traders, and analysts, to stay at the forefront of market trends and developments.

Fund Account Manager

Ultra-Capital Fund, NSW, Australia

(Aug 2022 - Present)

- Conducted back testing and developed a discretionary trading system, currently in the accreditation phase for risk management.
- Pioneered a proprietary trading strategy that yielded a remarkable 11% return over a 12-month period, surpassing benchmark indices.
- Executed buying and selling of securities on behalf of the company.

- Evaluated trading algorithms and implemented effective trading strategies.
- Collaborated closely with quantitative researchers to refine trading strategies, meticulously recording and reporting daily profit and loss.
- Maintained vigilant portfolio monitoring to ensure compliance with guidelines and remained abreast of shifts in the financial market.
- Contributed to the company's efforts to attract new clients by enhancing marketing materials.

Skills:

- Proficient in Notion for versatile database management.
- Proficient in Python for analyzing and visualizing extensive datasets, with a focus on quantitative finance.
- Accomplished in technical writing, especially within the realm of financial markets.
- Adept in tele-sales, cold calling, and sales of financial products.
- Profound expertise in financial market analysis.
- Strong presentation and organizational skills.
- Mastery of CRM systems, Microsoft Office Suite, and sales software.
- Extensive product knowledge spanning stocks, forex, and commodities.
- Exceptional communication and negotiation skills.
- Goal-oriented and self-motivated, with a strong aptitude for time management and meeting deadlines.
- Languages: English (proficient), Swahili (native), Arabic (beginner)

Education:

- Bachelor's Degree in Computer Science - United States International University-Africa, Nairobi, Kenya (2019-2021).
- Bachelor's Degree in Computer Science- University of Nairobi -(Relocation) Nairobi, Kenya (2017-2019).

Certifications:

- Advanced Forex Technical Analysis - Technical Fx Academy (2019-2022).

- Forex Market Analysis - Nairobi School of Forex (2019-2020).

Additional Information:

- References available upon request.
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