Manoj kumar

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Seeking position requiring excellent business management skills in an office environment, Position should require a variety of tasks, including need of strong administration and skills to achieve goals.

Professional Synopsis

- **MBA (Marketing) professional with over 5 years of experience in the domain of, Financial Product Sales, Client Servicing and Team Management.**
- Presently associated with **Kotak Mahindra bank ltd., Pune as Deputy Manager.**
- Effectively handled the responsibility of client relationship management, financial and portfolio analysis, advisory services to clients as well as preparation and review of financial statements on top performing companies.
- An effective communicator with excellent analytical, time-management and problem solving abilities.

Areas of Expertise

- Handling portfolio of Resident and Nonresident customer of approximately 10 cr.
- Cross sale all the financial product like Mutual Fund, Life Insurance, General Insurance, Asset Product like Home Loan, car loan, OD, LAP, LAS etc.
- Suggest Investment to the customer according to their need after doing financial planning.
- Achieve monthly target of revenue generation for company.
- Studying various financial statements viz. balance sheet, income statement, statement of changes in net assets, schedule of investments, cash flow statement, shareholder's interest, financial highlights & notes to financial statements.
- Analysing company's performances, conducting benchmarking study / trend analysis and using various business tools to assist the critical decision making process.
- Collating & interpreting financial data for determining financial performance of companies, comparing various companies within industry sector, analyzing past deals and developing valuation models.
- Delivering quality work under pressure.

Organisational Experience

Since Nov'12: Kotak Mahindra Bank ltd., Pune as Deputy Manager

Highlights:

- Handling Portfolio of Rs 10 Cr of existing Kotak Bank client Resident and Non- Resident.
- Generating Revenue through cross sale of the product like MF TD LI GI and also providing leads for Assets.
- Maintaining customer loyalty and promote brand identity by providing excellent customer service via regular updates and reviews on our range of financial products.
- Provide investment advice and recommendation to clients on various products like Mutual funds, fixed deposits, Retirement and insurance planning by utilizing appropriate asset allocation.
- Acquiring new customer for the company.
- Scrutinizing of all the Forms including Saving, Current, Investment and KYC check.
- Ensure that the aggressive sales targets for all relevant products and the client service quality standards are met.
- Managing portfolio of more than 350 customer of value 10 Cr approximately.
- Coordinating with head office for opening the account and clearance of fund/Remittance (inward or outward)
- Working on finacle software for different transaction in bank (for authorization of transaction Dr/Cr).
- Resolve the querry of customer under TAT, check quality control of branch.
- Actively involved in scrutinizing financial statements; ensured 100% quality output.
- Engaged in handling:-
- Interacted with clients on a regular basis for managing their queries, delivery of reports, communication, etc.
- Activate their Accounts by asking to Fund their A/c and maintain that.

Jun'10 - Nov'12: ICICI SECURITIES LTD., Pune as Senior Relationship Manager

Highlights:

- Handling portfolio of 20 Cr of existing customer.
- Acquiring new customer and provide financial solution to the customer.
- Examine and analyse financial and investment information collected from the customers to identify gaps between their present and future financial goals.

- Provide investment advice and recommendation to clients on various products like Mutual funds, fixed deposits, Retirement and insurance planning by utilizing appropriate asset allocation.
- Generate business through Life Insurance, General Insurance, Equity, and Future & Option online trading.
- Provide training to the customer for Equity & Equity Related product.
- Represent ICICI in twenty (25) sessions (batch of 15-20 people) as a website trainer in Customer Education Programmer conducted by ICICI every week.
- Responsible for effectively scrutinizing Demat Account Opening Forms & maintaining daily MIS reports pertaining to the incoming & outgoing forms.
- Responsible for verification for KYC.
- Coordinating & communicating with Head office.
- Ensuring timely resolution of complaints and timely action on all request received.
- Responsible of conducting Regular meetings and Training sessions for the employees.
- Also taking care of office administration activities.
- HO Coordination for all the issues.

Scholastics

- **MBA (Marketing)** from SMU University, Pune in 2010.
- **Post Graduation Program in Marketing** from Indira Institute of Management, Pune in 2010.
- **BA (English)** from Ranchi University, Ranchi in 2007.
- **XII (Science Stream)** from Ranchi College Ranchi, in 2004
- **X** St John's High school, Ranchi, JAC Board in 2002.

IT Skills:
- Proficient in MS Office – Excel, Word & PowerPoint, Tally, Windows 9X/ 2000/ XP/ Vista and All Internet Applications.

Academic Project

Title: Promotion and Distribution of Reliance Mutual Fund
Organisation: Reliance Mutual Fund, Pune
Duration: 2 Months
Overview:
- Successfully worked under the Financial Division of the company.
- The project aimed at understanding the financial aspects of liquidity, leverage and profitability.
- Conducted Ratio Analysis.
- Compared company's performance with competitor's performance.
- Based on the Ratio Analysis, suggested ways to reduce the cost.
- Conducted in depth study of mutual funds as an investment avenue.
- Analyzed consumer buying behaviour towards mutual funds investment.

Extramural Engagements

- Successfully completed NISM (Mutual Fund Distributor Module)
- Successfully complete NCFM Capitol Module in Jan. 10
- **Business Etiquette**
  Successfully completed an intensive programme on Grooming by Mr.Minocher Patel, Founder Director, Ecole Solitaire.
- **Leadership Development Programme**
  Successfully completed a 250-hour comprehensive performance-based by Stratecent Consulting, and have acquired the following skills.
    - Problem Solving Skills
    - Strategy
    - Teams

Personal Profile

Date of Birth : 25th Apri 1986
Marital Status : Married
Languages known : English and Hindi
Passport : Holding a Valid Passport