**Sagar Anil Vaidya**

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Career Objective

To acquire new skills and Knowledge through hard-work & explore my potentials for the growth of the organization.

Current Employer

**Company: SBI Capital Securities Ltd.**

**Designation: Executive (Client Advisory Group- Semi HNI)**

**Duration:** June 2011 to till date

**Role & Responsibility:**

* Advise High Net worth Individuals on equity & derivative market.
* Analyze and handle client portfolio of online HNI clients.
* Revenue generation by keeping them active.
* Wealth Management for by offering them investment products like Mutual Funds, Insurance, etc.
* Prepare Market Synopsis for internal circulation.
* Analyze Client’s day to day & MOM revenue by V-Lookup and through Pivot table.
* Online installing and managing Software installation and configuration.

**Additional Responsibilities:**

* Extract Bhav copy from NSE site.
* Extract Security file from FTP Server.
* Reconciliation of CNX 100 INDEX with Bhav Copy & Security files for verifying any changes in ISIN.
* Upload Bhav copy, CNX100 Index and security file on the server.
* Extract trade file from the server.
* Place Equity SIP (ESIP) bulk order through SOR system on daily basis.
* Extract trade file to obtain traded and rejected order.
* Forward rejected client order list to the back office.
* Remind customer who are due for the next trading session to lien the fund.
* Prepare MIS report for ESIP.

Previous Employer

1. **Company: Nirmal Bang Securities Pvt. Ltd.**

**Designation:** Senior Relationship Manager (Retail)

**Duration:** May 2010 to May 2011

**Role & Responsibility:**

* Responsible for Client's Relationship and Portfolio Management
* Risk management
* Responsible to lead & motivate the team.
* Responsible for generating revenue and getting new business from existing and new clients.
* Manage the relationship with customers to ensure persistency

1. **Company: India Infoline Pvt. Ltd.**

**Designation:** Assistant Relationship Manager (Retail)

**Duration:** May 2009 to May 2010.

**Role & Responsibility:**

* Dealing with various products like Equity, Mutual Funds, and Insurance etc.
* Maintaining Clients relationship.
* Servicing the Clients.
* Clients dealing
* After market hours involved in Clients Acquisition.

Post Graduate Cultural Course

**Institution- Tattvagyan Vidyapeeth Duration: (July’07 - May 09**)

Tattvagyan Vidyapeeth, Thane - an International Educational Institution of “Swadhyay” founded by Rev. Pandurang Shashtri Athavale. It’s a two years Residential Post graduate Cultural course that focuses on finer aspects of life, and designed to fill-up the gaps in current education system. It inculcates the quest for knowledge, passion for action, Achieving through discipline & mastering the detail, standing by values, and fantastic team work.

Educational Qualification

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Year** | **Degree/Course** | **Institution** | **Board/University** | **Marks**  **Obtained** |
| Oct-2012 | CFA | ICFAI | ICFAI | ‘C’ Grade\* |
| Mar-2007 | B.com | Ritumbhara College, Juhu. | Mumbai  University | 62.85% |
| Feb-2003 | H.S.C | Public School & Jr. College, Santacruz. | Maharashtra  Board | 54.67% |
| Mar-1999 | S.S.C. | Jnana Sarita High School, Mulund. | Maharashtra  Board | 58.26% |

\* Recently ICFAI University has started grading system for CFA course.

NSE Certifications

* NCFM Capital market (Dealers) module.
* NCFM Derivative (Dealers) module.
* NISM Currency Derivatives module.
* NISM series VI – Depository Operations Certifications Examination.

Software Skills

* OPERATING SYSTEM- Windows - 2000, XP.
* Microsoft OFFICE 2007
* V-Lookup, H-Lookup, Pivot Table.

Achievements

Professional:-

* Runner-up in ESIP registration in the month of Aug.2011.
* Winner in MOM increment in % as well as absolute term in the month of oct.2011
* Winner in promotional campaign of RELGOLD in the month of Oct. 2011

(Sold highest to online unique client).

* Winner in highest F&O brokerage in the month of Nov.2011.
* Winner in promotional campaign of RELGOLD in the month of April 2012

(Sold highest to online unique client).

Sports & others:-

* Winner in Kho-Kho & Kabaddi in Mulund Bhandup Olympics 1998.
* Winner in 20th Bombay Suburban Interschool “One Act Plays” Contest 1993.
* Attended and took training of Karate from Okinawan Shorin Matsubayashi-Ryu Karate do Association, Japan.
* Undertook a series of Cultural Exam conducted by Tattvagyan Vidyapeeth, Thane.

Personal Details

D.O.B : 03rd March 1984

Gender : Male

Nationality : Indian

Marital Status: Married

Hobbies : Reading, Music, Dancing, and Sports

Languages : English, Hindi, Gujarati, Marathi