ANKITA KUMAR, MA Business Management

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**PROFFESSIONAL OVERVIEW**

* A Dynamic, savvy, self driven, Master’s Degree professional with a successful 5-year track record in Investment Banking, Business Analysis for **Barclays Wealth and Investment**, **Bank of America** (Banking & Financial Services) and Pure Fashions (Retail and Sales Services).
* Strong skills in providing strategic recommendations that add value to clients for business growth.
* Excellent in interpersonal, analytical, communication and organisational skills.
* Proven abilities in team management, stakeholder management, customer relationship management & effective crisis and risk management.
* Strong knowledge in Investment Banking operations, Portfolio Analysis for Mutual funds and CDO Markets, Credit Risk Management, KYC Rules and Regulations.

**QUALIFICATION**

* MA in Business Management (Sep’ 2010 – Nov’ 2011)

*Leeds Trinity University College, Horsforth, Leeds, UK*

* Bachelor’s Degree in Commerce (2004-2007)

*Delhi University, India*

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| **PROFFESSIONAL SUMMARY** |

* **Barclays Wealth and Investment - September ’12 – January’ 14**

**Account Management Analyst – Wealth and *Investment Banking - Glasgow, United Kingdom***

UAT Testing for Avaloq project: *As a Project lead*

* Conducted functional, integration and UAT testing on the application
* Attended status update meeting weekly basics and defect update meeting for daily basis
* Worked closely with business analysts and developers to update process flow.
* Preparing Training material and User Notes for the team
* Presentations on the project flows.
* Dual keying Process to make sure BAU is not affected and Testing is done as well.

RDR project: *UAT Testing*

* Attended status update meeting weekly basics and defect update meeting for daily basis
* Worked closely with business analysts and developers to update process flow
* Worked as a processor in the project team, making sure the target is met and process is working as per the FSA Requirements and guidelines.

Analyst, Investment Management Services:

* Account Openings, Amendments, Closures, charging Fees and Services across a range of products private banking, structured products, derivatives, fixed income, and investment funds.
* Liaising with key Business stakeholders in EMEA and US regions to ensure the adherence of all funds to the Compliance and Regulatory environment like FSA, SEC and FINRA.
* Experience to organize and manage workflow and identify and investigate problems as per FSA KYC Regulatory Regulations.
* Weekly and Monthly Reporting for Commission Charged for clients, Reconciliation for all the amendments.
* Applying Anti-Money Laundering and Client Due Diligence (CDD) as well as internal Policies and Procedures to the maintenance of existing clients as well as the on-boarding of new clients.

Analyst, Stock Transfers – Investment Management Services:

* Ttransferring Stocks for Investment Products and Private bank clients
* Daily Reporting and reconciliations for Stock Transferred and charged fees.
* Applying Capital Gains Tax for key clients on Investment Products and Services.
* Probate Valuations of Deceased Clients and transferring the left stocks.
* **Pure Fashions - May 2010 – August 2012**

Manager - *Glasgow, United Kingdom*

Pure fashion is an expanding company of 15 retail outlets all over Scotland. I have experience of working in their head office in Glasgow, Scotland as a Business Manager with responsibility of pricing of the products, forecasting the sales and maintaining reorder levels in order to maximize profits and minimizing the cost levels.

As a Manager I have:

* Experience of maintaining Sales and Purchase Ledgers manually and using SAGE systems.
* Proven ability to work on Payroll Applications.
* Analyzing the sales of the company for forecasting the company’s profits and expenses.
* Negotiations skills to liaise with the suppliers.
* Proven experience of Reconciling the reports and accounts.
* Knowledge of methods to improve sales and marketing of the brand.
* **Bank of America May’07 – March’09**

CDO Trading Analyst - *Investment Banking – New Delhi, India*

As a trading Analyst I have:

* Analyzed the US CDO markets, the prevailing interest rates within the market for Tier 1 Financial entities like Goldman Sachs, JP Morgan, UBS, BNP Paribas.
* Created official trade documents for the banks clients, reconciled the financial trade accounts and statements.
* Analyze transactions of CDO Market between banks.
* Coordinating with other departments for new trades and updates on client requirements.

***Tools and Technologies***

* Proficient in MS Excel, MS Project, MS Word, MS PowerPoint, MS Visio and Outlook.
* Knowledge and Experience of using Banking applications like CRM, ADIR, Rhyme SIGHT, Charles River, AVALOQ, Quality Centre

**KEY COMPETENCIES AND SKILLS**

* Expertise in Project Initiation to Execution, Analysis, Documentation, Validation, Testing, deployment and Post Implementation support.
* Change Management Skills
* Ability to handle large volume of invoices and reconciling them.
* Managed key client relationship and responsibilities across a broad spectrum, as a trusted advisor to management.

***References are available on request.***

***Flexible to relocate & Travel***