



VENKATESH A P

INVESTMENT ANALYST

CONTACT

 9629267272

 venkatraju133@gmail.com

SKILL SET

- Technical Analysis
- Market Research
- Advanced Excel, MS-Office
- Power BI
- Investment Strategies
- Portfolio Management
- Risk Management

EDUCATION

MBA

BUSINESS ADMINISTRATION

JAN 2016-JAN 2018

UNIVERSITY OF MADRAS

B.E ECE

PANIMALAR INSTITUTE OF TECHNOLOGY

JUL 2011-MAR 2015

PROFILE

Dedicated and results-driven finance professional with a strong foundation in financial analysis, investment strategies, and portfolio management. Possesses practical experience in trading and mutual fund investment, complemented by advanced skills in Excel and Power BI. Proven ability to conduct thorough market research and implement effective risk management techniques. Certified in NISM Mutual Fund Distribution. Seeking to leverage analytical skills and investment knowledge to contribute to the success of a leading investment bank or asset management firm.

INDEPENDENT EXPERIENCE

Independent Trader

- Conducted thorough market analysis and developed trading strategies in equities and options.
- Managed a personal trading portfolio.
- Utilized trading platforms DHAN, UPSTOX to execute trades and monitor market trends.
- Implemented risk management techniques to optimize returns and minimize losses.

Mutual Fund Investor

- Analyzed and invested in various mutual funds to build a diversified investment portfolio.
- Monitored fund performance and made informed decisions to adjust allocations as necessary.
- Conducted research on market trends, economic indicators, and fund management strategies.

Professional Development:

- Attended webinars and workshops on investment banking, asset management, and mutual funds.
- Regularly watch financial news and email publications to stay updated on industry trends.

CERTIFICATIONS

- NISM, MUTUAL FUND DISTRIBUTION CERTIFICATE (2024-2027)
- ADVANCED EXCEL WITH POWER BI

LANGUAGES

- ENGLISH
- TAMIL
- TELUGU

PROFESSIONAL EXPERIENCE:

IDFC Bank

Sales Executive (Officer)

[FEB, 2020] – [SEP, 2020]

- contributing to the overall sales goals of the team. Developed and maintained relationships with key clients, resulting in increased client retention, significant new business. Conducted market research to identify new business opportunities. Collaborated with marketing and product teams to develop effective sales strategies, cross sales and campaigns. Delivered exceptional customer service, resolving issues and ensuring customer satisfaction.
 - **Note:** Due to the COVID-19 pandemic, my tenure at IDFC ended without a formal relieving letter.
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