Sagar Talreja

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**Objective:**

Aiming to achieve a successful career where I can make a significant contribution using my knowledge, skills and experience with the objective of development and growth of the Organization.

**Academic Qualification:**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Qualification | Specialization | Board/University | Percentage/ CGPA | Year of Passing |
| MBA | Finance and Operations | IILM Institute for Higher Education | 2.65/4 | 2012 |
| BBA | Management | Guru Gobind Singh Indraprastha University | 60% | 2010 |
| 12th | Commerce with Maths | CBSE | 73% | 2006 |
| 10th |  | CBSE | 75% | 2003 |

**Experience:**

Company Name: Stalwart Advisors

Position: Equity Advisor

Duration: September 2017- January 2018

Roles and Responsibilities:

* Acquiring clients through lead conversion.
* Secondary research.
* Servicing and resolving the client queries.
* Handling social media i.e. Twitter and Facebook.
* Engaging in activity to improve client engagement.
* Handling Dashboard for the Webchat and resolving queries.
* Reading research related reports and addressing queries for clients.

Company Name: Jyoti International Foods Pvt Ltd

Position: Sales and Operations Manager

Duration: September 2015- April 2017

Roles and Responsibilities

* Managing corporate tie ups to boost store sales.
* Coordinating with the vendors for timely delivery of products and ensuring smooth operations of the stores.
* Analyzing monthly and yearly Profit and Loss statement.
* Coordinating with different departments to ensure smooth flow of operations.
* Training new work force and make them familiarize with the working of all the stations.
* Generating Daily Sales Report and MIS.

Company Name: ICICI Securities

Position: Sr. Relationship Manager

Duration: December 2014- August 2015

Roles and Responsibilities

* Handling Direct Channel which focuses on Retail Sales.
* Acquiring HNI Clients through reference and lead conversion.
* Analyzing financial needs and suggesting mutual funds.
* Undertaking activities to promote Mutual Funds Products for Retail Clients.

**Courses and Certifications:**

AFP- Insurance Planning, Investment Planning, Retirement Planning and Tax Planning.

NISM (VA) - Mutual Fund Distribution

Technical and Derivative Analysis.

**Internship:**

Copal Amba: Worked as a Research Analyst. Creating company profiles, analyzing various business segments of revenue for the company and calculations of Financial Ratios.

**Additional Information**

* Represented School and clubs in various cricket tournaments.
* Participated in quiz and competition at School Level like National Science Olympiad and Math Quiz.