

SMRITIPARNA DAS

Advisor cum analyst – Investment and Mutual funds

Financial advisor and analyst with 6 years of experience in spectrums like Investment banking services, Trading, Strategic planning and in mutual funds domain. Seeking to leverage leadership abilities through managerial assignments by exposure to opportunities to deliver cultivated skills and to execute challenges with responsibility thereby contributing to the organizational growth.

Currently undergoing career pause since 2020 to improve on health and maternity break, thereby pursuing personal development through online courses, engagement in creative content making through YouTube and oversaw end to end care of our new-born child. I am now ready to re-enter into the corporate sector and also immediately available preferably for work from home assignments.

PROFESSIONAL SYNOPSIS

- ❑ 6 years of experience in the field of Investment banking and trading as Investment advisor, Analyst, Team Lead and customer support executive
- ❑ Proven track record in conducting direct trades with customers over telecon or walk in, thus exposure to managing stakeholders
- ❑ Demonstrated abilities in handling team of subordinate analysts and guiding them towards achieving organization goals and targets.
- ❑ Skilled in providing high quality customer service in professional metrics
- ❑ A strong team leader with excellent communication, analytical, negotiating, interpersonal and problem solving abilities.
- ❑ Qualified M.B.A. (Finance) from Raja Lakshmi Engineering College, Chennai


ORGANISATIONS

- ❑ **March 2020 – Present: Career break**
Location: Surat, Gujarat, India
Description : Active childcare and focus on personal development
- ❑ **Jan 2018 – Feb 2020: NJ India Invest Pvt. Ltd.**
Location: Surat, Gujarat, India
Description : Sr. Operation executive (Query resolving)
- ❑ **Feb 2014 – Jan 2017: Aditya Trading solution Pvt. Ltd.**
Location: Chennai, TN, India
Description : Financial Analyst
- ❑ **Jan 2013 – Oct 2013: Angel Broking Pvt. Ltd.**
Location: Chennai, TN, India
Description : Investment Advisor

WORK EXPERIENCE

➤ As Investment Advisor

- ❑ Carry out trades for customers (over telecom or walk-in)
- ❑ Put up stock quotes and regularise market updates to customers.
- ❑ Handle customer queries about stock market and trade
- ❑ Follow up on leads from potential customer

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 **Location :**
Surat, Gujarat, India

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CORE ATTRIBUTES

- Investment banking and operations
- Financial Management of Banking & NBFCs.
- Accounts handling, Team management
- Managing stakeholders, internal customers
- Exposure to back office operations

INTERPERSONAL SKILLS

- Liaison with internal customers and external parties
- Lead and develop analyst team
- Stakeholders engagement
- Pro-active, solution oriented
- Analytic & presentation skills

ACADEMIC CREDENTIALS

- **MBA - Finance :**
Institute – Rajalakshmi Engineering College, Chennai. Year 2013
CGPA marks : 6.93
- **Bachelor of Computer Applications :**
Institute – ABC Academy, Sikkim Manipal University. Year 2009
Marks : 63 %
- **A.I.S.S.C.E (Higher Secondary) :**
School – Bodhicariya Senior Secondary School, CBSE Board, Saltlake, Year 2006
Marks : 61 %
- **A.I.S.S.E (Secondary) :**
School – Kanchrapara Harnett English Medium School, CBSE Board, Year 2003
Marks : 51 %

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LANGUAGES

- English – Fluent
- Hindi – Fluent
- Bengali - Fluent
- Tamil – Intermediate
- Gujrati - Intermediate

COURSES

- **NISM series-8 Equity & Derivatives module**
Marks: 70.75 %
- **NISM Series V-A mutual fund distributor certification**
Marks: 67 %

PERSONAL SNIPPETS

- Nationality : Indian
- Age : 36 Years
- Passport validity : Till April 2032
- Martial status : Married
- Hobbies : Youtube Content

➤ **As Analyst**

- ❑ Handling teams of Junior Analysts located in Chennai and Bangalore divisions
- ❑ Updating regular frequencies of stock market movements with team members and with clients
- ❑ Maintaining MIS of all Team members on daily work schedule, achieved progress and weekly targets
- ❑ Handling Customer queries and conducting Trades
- ❑ Organising Pay-in, Pay-outs

➤ **As Sr. Operation Executive**

- ❑ Handling queries of customers based on mutual funds.
- ❑ Solving operational queries in mail or telephonic platform

TRAINING and PROJECTS

➤ **Managerial**

- ❑ “Study on investor’s Preference on Insurance sector and equity market” as Final Project in ING Vysya Life Insurance, Chennai

➤ **Behaviorial**

- ❑ Induction Training Program for personality development as part of Summer project in Apollo hospital, Chennai