



MOHAN R

 www.linkedin.com/in/mohanr7401

LEAD SPECIALIST

 Mtm.kcs@gmail.com

 41 - Chennai, TamilNadu

 7401647399

SUMMARY

Experienced Lead Specialist with 9+ years of experience in mutual fund backend operations, specializing in Systematic Investment Plans (SIPs). Proven ability to lead and manage a team to ensure accurate, timely processing of SIP transactions, adherence to regulatory compliance, and smooth functioning of the SIP investment cycle. Possess strong analytical and problem-solving skills with a deep understanding of SIP processing, mutual fund accounting principles, and industry regulations

TECHNICAL SKILLS

- | | |
|--------------------------------------|-------------------------------|
| • ITNET process setup | • Reconciliation |
| • Microsoft Power BI | • SQL |
| • Excel(Pivot, Vlookup, Macros) | • Type Writing(Junior) |
| • SIP and STP Transaction Management | • Proficient in MIS dashboard |

SOFT SKILLS

- | | |
|----------------|----------------------------|
| • Leadership | • Good communication skill |
| • Organisation | • Adaptability Great |
| • Statistics | • problem solving skill |

CERTIFICATES

Jul - 2023

SQL

Guvi Institute

Oct - 2019

NISM 2B

National Institute of Securities Markets (NISM)

Aug - 2013

TYPEWRITING ENGLISH JUNIOR


Meenakshi Commercial Institute


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EDUCATION

<u>2017 – 2019</u>	ANNAMALAI UNIVERSITY Masters of Business Administration	GPA 3.1
<u>2013 – 2016</u>	ANNAMALAI UNIVERSITY Bachelor of Arts	GPA 3.0

EXPERIENCE

<u>Jun 2019 – present</u>	COMPUTER AGE MANAGEMENT SERVICES LIMITED – CHENNAI Lead Specialist <ul style="list-style-type: none">Led a 7-member team, achieving 95% accuracy in SIP transaction processing.Streamlined SQL queries for error data retrieval, reducing execution time by 30%.Developed SQL-based insights for clients, enhancing data accuracy and actionable reporting.Utilized advanced Excel tools (Pivot Tables, VLOOKUP) to create comprehensive, client-focused reports.Successfully implemented ITNET automation for process optimization, aligning with client objectives.
<u>Dec 2018 – Jun 2019</u>	STAR HEALTH INSURANCE – CHENNAI Executive <ul style="list-style-type: none">Processed customer applications efficiently, resolving 90% of queries during initial contact.Delivered prompt resolutions during calls to enhance customer satisfaction.
<u>Jan 2015 – Dec 2018</u>	COMPUTER AGE MANAGEMENT SERVICES LIMITED – CHENNAI Data Entry Operator <ul style="list-style-type: none">Expertly managed inward processes for Union Mutual Fund, ensuring seamless team operations.Optimized workflows to maintain high accuracy in transaction processing.