

Shubham Digambar Bhalke

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Master Of Business Of Management

Dr. Moonje Institute Of Management.

MBA IN FINANCE/HUMAN RESOURCE MANAGEMENT

GPA: First Class with distinction.

Nashik

June 2021 – Dec 2023

Pune University

BACHELOR OF COMMERCE IN BANKING AND FINANCE

GPA: First Class With Distinction

Sangamner

April 2021

Experience

Tripathi Properties And Constructions

Mumbai

CLIENT RELATIONSHIP MANAGER AND ADMINISTRATIVE ASSISTANT

May 2019 – Dec 2023

- Coordinated efforts between various departments such as sales and Operation Teams for smooth delivery of services to the clients
- Developed targeted Presentation for Prospective Clients showcasing the value of our Products
- Providing exceptional service, resolving the issues promptly and maintaining the client trust
- Evaluated and negotiated contracts to procure favorable financial terms
- Schedule appointments, and maintain and update supervisors' daily calendar
- Screen all incoming phone calls, inquiries, visitors, and correspondence, and route accordingly
- Maintain confidentiality of highly sensitive information
- Manage complex office administrative work requiring the use of independent judgment and initiative
- Coordinate travel arrangements

Motilal Financial Services

Mumbai

PORTFOLIO MANAGEMENT INTERN

Sept 2023 – Dec 2023

- Collecting Client Portfolio Details and Analyzing their feedbacks
- Developed a strong relations with a clients through effective communication fostering trust and Satisfaction
- Provided a exceptional costumer service when addressing a client inquires. or concern related to client's account and investment
- Reporting Manager

Skills

Budgeting:

By MindLuster

Presentation:

By LinkedIn

Establishing Credibility As a Speaker:

By LinkedIn

Microsoft Advance:

By LinkedIn

Investment Banking:

By Great Learning

Project Management:

By Great Learning

Relationship Building:

Projects

Portfolio Management

Mircosoft, Wikipedia

TO GET THE OVERALL KNOWLEDGE OF SECURITIES AND INVESTMENT. TO KNOW HOW THE INVESTMENT MADE IN DIFFERENT SECURITIES MINIMIZES THE RISK AND MAXIMIZES THE RETURNS. TO GET THE KNOWLEDGE OF DIFFERENT FACTORS THAT AFFECTS THE INVESTMENT DECISION OF INVESTORS. TO KNOW HOW DIFFERENT COMPANIES ARE MANAGING THEIR PORTFOLIO I.E. WHEN AND IN WHICH SECTORS THEY ARE INVESTING.

DEAN AND DIRECTOR MEET

August
2022

Best Coordinator of the Event 2022,,

Academic
Coordinator