RAJAT SINGH

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LinkedIn

About Me

Results-driven financial professional with experience in client relationship management and portfolio handling, seeking to leverage analytical skills and financial knowledge in investment banking. Strong background in financial products, compliance, and client advisory, complemented by ongoing Master's in Global Finance from SP Jain School of Global Management

Education

Master of Global Business
Specialization

June 2025
– May 2026

SP Jain School of Global Management, Singapore-Sydney-Dubai
Global Finance
Gained knowledge in: Financial Modeling, Valuation method, Investment banking, M&A, Corporate Finance
Term 1 and 2 Project – Evaluating the Financial Impact of ONDC on Small Retailers and Gig Service Providers in India: A Study of Early-Adopting Cities
This study explores how ONDC (Open Network for Digital Commerce), a government-backed digital commerce initiative, is transforming the financial landscape for small retailers and gig-based service providers such as taxi drivers and food delivery agents in India.
Key issue to be studied include the impact of ONDC on working capital efficiency and income stability.

Post Graduate Diploma in Banking
Manipal University **2016 - 2017**

Bachelor's of Arts (Economics and Political Science)
Lucknow Christian College **2012 - 2015**

Work Experience

Deputy Manager

January 2017
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January 2018

ICICI Bank, India

- Led financial analysis and advisory for 300+ HNI clients, demonstrating strong analytical and client relationship management capabilities within wealth management.
- Structured and executed complex financial transactions while ensuring 100% compliance with regulatory requirements, including KYC and AML protocols.
- Demonstrated exceptional attention to detail through a perfect KYC/AML compliance record, supporting risk management objectives.
- Successfully managed multiple competing priorities while consistently achieving 120% of quarterly targets, contributing to sales objectives.
- Developed and presented comprehensive client presentations using PowerPoint and Excel for investment recommendations, supporting wealth planning.

Skills

- **Client Relationships & Sales:** HNI/NRI Client Handling, Cross-selling (CASA, Loans, LI, FD, PPF), Sales, Client Advisory, Building Trustworthy Partnerships
- **Wealth Management & Planning:** Wealth Management, Wealth Planning, Portfolio Handling, Investment Banking, Capital Markets, Asset Management, Financial Services, Risk Management, Financial Analysis, Financial Modeling, Valuation Analysis, M&A Transaction Support
- **Operations & Compliance:** KYC & AML Compliance, Preparing Reports, Regulatory Compliance, Deal Documentation, NEFT, RTGS, Fund Transfers, Finacle Core Banking, Sales CRM, Banking Software Proficiency
- **Technical Skills:** Microsoft Excel (Advanced Financial Modeling), Financial Analysis Tools, Presentation Software (PowerPoint)
- **Communication & Collaboration:** Written and Verbal Communication, Excellent Interpersonal Skills, Client Presentation & Communication, Collaboration, verbal communication skills
- **Personal Attributes:** Attention to Detail, Accuracy, Analytical, Motivated, Committed, Ethical, Supportive, Caring, Highly competitive

Certificates

- Post Graduate Diploma in Banking
- Design Thinking

Awards & Achievements

- Certificate of Appreciation
- Sword of Honors
- Recognized as Top Performer in branch-level CASA acquisition drive (Q3 2017)
- Achieved 2nd place in regional product knowledge competition