

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
12 th	Commerce with Maths	CBSE	73%	2006
10 th		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.