

Dinesh Joghee Sockkan

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MBA graduate specialising in Finance and Marketing with over 12 years of intense expertise in wealth management advisory, banking and Investment Products in India and Oman

Professional Summary

- Possess comprehensive understanding of wide range of financial vehicles including equities, derivatives, structured products and banking.
- Well-organized and meticulous professional with abilities of independently handling a wide spectrum of activities backed by innate abilities to withstand work pressure.
- Highly effective communicator with exceptional talent for problem solving through reasoned thought process and excellent track record of employer satisfaction.
- Computer savvy individual well versed with the modalities of corporate culture.

Professional Profile

- Develop and oversee relationship with High Net worth clients in Oman.
- Conduct comprehensive review of the client portfolio and suggest investment strategies based on objectives and risk profile of the client.
- Identify opportunities and provide customized asset allocation suggestions.
- Exceptional understanding of a wide range of financial products and have been successful in explaining and promoting complex financial products to the customers.
- Have successfully sourced numerous new customers to the bank and deepened relationship value
- Managing client relationships and maximizing referrals and sales opportunities.
- Based on the requirement/needs & risk appetite of our customers focus on well researched delivery trades.
- Regular conference calls and personal meetings with equity research experts for portfolio review of the clients

Professional Experience**M/s Excite Consultants – Coimbatore – India**

Partner & Investment Consultant (Since July '2016)

Kotak Securities Limited – Muscat – Oman

Assistant Manager (December '2010 to March '2016)

ICICI Securities Limited – Muscat - Oman

Business Development Executive (March '2009 to November 2010)

Unicon Securities Private Limited (Coimbatore - India)

Branch Manager (July '2007 to August '2008)

India bulls Securities Limited (Coimbatore - India)

Branch Manager (June'2006 to June '2007)

Sales Manager (November'2005 to May'2006)

Relationship Manager (August'2004 to November'2005)

Educational Qualification

Masters in Business Administration (2002-2004.) (Specialization: Marketing and Finance)
from D.J.Academy for Managerial Excellence, India

Bachelor in Commerce (1999-2002) **from** Bharathiar University, India

Higher Secondary Education (HSLC) (1998-1999) Breeks Memorial Anglo Indian Higher
Secondary School, India

Certified In NSE's Certification in Financial Markets (NCFM)

- Capital Market Dealers Module.
- Derivatives Core Module
- Have obtained AMFI's Certification in 'AMFI Mutual Funds Advisors Module' for distributing mutual funds.
- IRDA licensed for distributing Insurance

Personal Details

Date of Birth : 05-09-1981.

Sex : Male

Marital Status : Married

Language Known : English & Tamil

Nationality : Indian

Current Location : Coimbatore, India