

SHWETA JHA

Relationship Manager | Equity Derivatives

Faridabad (Delhi NCR)

Phone: 7428714906

Email: sjha42443@gmail.com

PROFESSIONAL SUMMARY

Client-focused Relationship Manager with hands-on experience in equity derivatives advisory and financial sales. Worked with reputed organizations in capital markets and insurance domains.

Skilled in client handling, trade support, market communication, and revenue-oriented relationship management. SEBI NISM certified with strong interest in capital markets and client servicing roles.

PROFESSIONAL EXPERIENCE**Relationship Manager – Equity Derivatives**

Motilal Oswal Financial Services Ltd

- Managed and supported retail clients in equity and derivatives segment
- Assisted clients with trade execution, margins, positions, and order-related queries
- Provided daily market updates and handled client communication during volatile market conditions
- Focused on client retention, relationship building, and revenue support
- Coordinated with internal teams to ensure smooth client servicing

Associate Sales Consultant

Policybazaar.com

- Interacted with customers to understand insurance and financial product requirements
- Converted leads through structured follow-ups and relationship-based selling
- Coordinated with internal operations teams for smooth policy issuance
- Ensured post-sales support and customer satisfaction

EDUCATION & CERTIFICATIONS

Bachelor of Science (B.Sc.) – Pursuing

NISM Series VIII – Equity Derivatives | SEBI Certified

KEY SKILLS

Client Relationship Management, Equity Derivatives (Basic Practical Knowledge), Trade Execution Support, Market Updates & Risk Communication, Sales & Client Acquisition, CRM Handling, MS Excel (Basic)

JOB PREFERENCES

Preferred Locations: Noida | Gurugram | Delhi NCR