



# Jyoti Prakash Dash

Bangalore, India

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in <https://www.linkedin.com/in/jyoti-prakash-dash-65915420b>

## Objective

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Seeking to leverage my expertise in financial management and client relations to contribute to a dynamic team in a challenging new role. Committed to delivering high-quality service and driving organizational success through strategic problem-solving and strong interpersonal skills.

## Internship

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- Accuvers** June 2021 - July 2021  
Stock market management internship
- Collabadda** Sep 2022 - Dec 2022  
Influencer marketing internship
- Nblik** October 2022 - November 2022  
Community management internship
- Elroy management solutions LLP** 14/06/2023 - 15/09/2023  
Accounts and Taxation intern  
Accounts receivable and payable, GST, Income tax, tally erp

## Work Experience

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- HDFC AMC**  
*Sep 2023- May 2024*  
**Virtual Relationship Manager**  
As a Virtual Relationship Manager at HDFC AMC, I was stationed at a virtual channel of HDFC Bank, where I engaged with the bank's Relationship Managers to generate and develop leads. My role encompassed a broad range of responsibilities such as,
  - 1. Client Interaction:** Engaging with clients via calls, emails, or video conferencing to understand their investment needs and goals.
  - 2. Investment Advisory:** Offering tailored mutual fund recommendations based on the client's financial profile and market conditions.
  - 3. Portfolio Management:** Assisting clients with portfolio reviews, rebalancing, and performance tracking.
  - 4. Support and Guidance:** Addressing client queries, resolving issues, and providing information about fund options and market trends.
  - 5. Education:** Educating clients on investment strategies, mutual fund products, and financial planning.
- May 2024- Present**  
**Unit Manager**  
As a Unit Manager at HDFC AMC's Whitefield branch, I oversee both operational and business development functions. My role involves managing day-to-day operations to ensure efficiency and effectiveness, while also driving business growth through strategic sales initiatives. My responsibility includes,
  - Team Management:** Mentoring a team of relationship managers or sales associates of different bank that's allocated to me, ensuring they meet their performance targets and adhere to company policies.
  - Client Relations:** Handling high-net-worth clients as well as basic portfolio clients and providing them with personalized investment advice and maintaining strong relationships.
  - Sales and Business Development:** Developing strategies to enhance sales, expand the client base, and increase assets under management (AUM) for the mutual fund.
  - Training and Development:** Conducting training sessions for Bank employees to improve their product knowledge, sales techniques, and customer service skills.
  - Reporting and Analysis:** Monitoring and analyzing unit performance, preparing reports for senior management, and implementing improvements based on performance.

## Education

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- **National School of Business** 2021- pursuing  
Master of business administration
- **ICMAI** 2022- pursuing  
Cost and management accounting
- **Kalinga college of commerce** 2017-2020  
B.com  
75%
- **Bhadrak junior college** 2015 - 2017  
Pre- University board, Odisha  
48%
- **K.M Bidyapitha** 2015  
10th  
73%

## Skills

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- Accounting
- Tally prime
- MS OFFICE
- Stock market management
- Digital marketing
- Business analytics
- Investment banking
- Operation
- GST
- Finance
- Taxation
- Advance Excel
- Relationship management
- SQL

## Certifications

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- NISM
- Sql in data science
- Stock market
- Investment banking
- Financial modelling and valuation
- Digital marketing

## Languages

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- English
- Hindi
- Oriya

## Declaration

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- I hereby declare that all the information given above is true and correct to the best of my knowledge. All the information shared in the resume is correct, and I take full responsibility for its correctness.