



# JASBIR SINGH

New Professor Colony, Village-Jalalpur, Patiala, 147021

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## PROFESSIONAL SUMMARY

Strategic thinker with proven track record of achieving financial objectives. Stays up-to-date on market trends to deliver actionable insights and evidence-based advice. Manages caseload of clients in line with industry regulations.

## EDUCATION

**12TH, MARCH 2016**

CBSE: RESULT: 69%

**10TH, JULY 2014**

CBSE - RESULT, 64.4CGP

**BACHELORS OF BUSINESS ADMINISTRATION: PUNJABI UNIVERSITY PATIALA**

FINANCIAL MARKETS, APRIL 2019

## ADDITIONAL INFORMATION

- PRESENTATION SKILLS.
- CAN HANDLE PRESSURE AT WORKPLACE.
- SKILLS
- Advance Diploma in Computer Application of 120 Hours (MS-Office- word, Excel, Powerpoint, Basics, Data Entry, Typing)
- Tally Software
- Busy Software

## EXPERIENCE

### SBI CAP, Patiala - INDIA

#### Asistant Relationship Manager- 09/2023 to TILL NOW

- ensure active management of clients & achieve the target active AUM
- To be responsible for identifying customer needs, assessing their risk appetite and providing them investment options
- To provide regular updates to the clients regarding the market changes and subsequent changes to the portfolio
- To achieve healthy revenues without compromising on client profitability
- To have clear focus on client mining
- To conduct regular Client Meetings & update the same in the meeting tracker
- To attain maximum reach of investment ideas/stock calls initiated
- Keep abreast of the market news, financial trends and current affairs
- To attend post result con-calls, analyst meets for improved client servicing.

### Kotak Securities- Patiala, INDIA

#### Assistant Manager, 02/2023 TO 08/2023.

• Advising clients on Margin Trading Facilities and Derivatives. • Fostering client relationships and providing education on investment opportunities. • Acquiring new clients to meet targets and promoting third-party products such as Mutual Funds.

### HDFC Securities - Patiala, INDIA

#### Relationship Manager, 04/2022 to 02/2023

- Guiding the clients on Margin Trading Facilities and Derivatives.
- Building relationships with clients & educating them about Investments.
- Client Acquisition as per targets and promotion of 3rd party products (Mutual Funds, Insurance, SIP etc.).
- Clients Meetings.
- Executing Trade Orders.
- Advising Clients based on Research Report.

## CERTIFICATIONS

- Certification in NSE Academy or NCFM program in Financial Markets
- Certification in NSE Academy or NCFM program in Commercial Banking in India.
- Certification in NSE Academy or NCFM program in Life and general Insurance.
- Certification in NSE Academy or NCFM program in Mutual funds.
- Certification in NSE Academy or NCFM program in Depository Operations
- Certification in NSE Academy or NCFM program in Derivative Market Operations
- Certification in NSE Academy or NCFM program in Capital Market Operations
- Certification in NSE Academy or NCFM program in Foundation of Currency Derivatives.
- Certification in NISM series V-A Mutual Funds
- Certification in NISM Series VIII: Equity Derivatives.