

# dilip sainy

Assistant Manager



1 Year 6 Months



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## Key skills

- Wealth Management
- TPP
- Third Party
- Equity
- Investment
- Dmat
- Mutual Funds
- Trading Account
- Trading
- Demat Account Opening
- Cross Selling
- Broking
- Convincing Power
- Demat
- Stock Market
- Stock Broking
- Management
- Marketing
- Sales
- Life Insurance
- General Insurance
- Health Insurance



## Personal Information

City **Gwalior**  
Country **INDIA**



## Profile Summary

- completed BE from mechanical engineering
- 3 year diploma program in plastic engineering
- Having 2 years of experience of Demat acquisition & cross sales.



## Education

MBA/PGDM, 2025

IPS College of Technology and Management,  
Gwalior

B.Tech/B.E., 2019

RKDF College, Bhopal

12th, 2014

Madhya Pradesh,  
English

10th, 2011

Madhya Pradesh,  
English



## Work Experience

Dec 2023 - Present

Assistant Manager  
Kotak Securities (KSL)

1. responsible for new client acquisition , building new relationships and increasing depth in existing relationship with client.
2. will be responsible for primarily selling equity based investment products.
3. responsible for identifying customer needs, accessing their risk appetite and providing them investment options.
4. responsible for achieving targets as assigned by the organization on a monthly basis.
5. provide regular updates to the immediate superior as an when



## Languages

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- english
- hindi

required.

6. Handle branch for almost 10 months in absence of branch manager and generate revenue as branch required.

**Jun 2023 - Nov 2023**

Branch relationship executive

**SBI Card**

- Developing and maintaining relationships with high-value clients, resulting in a 20% increase in branch revenue over the last six months.

- Strategically promoting SBI Card products to achieve a 15% growth in customer base within the assigned branch.

- Conducting financial analysis and identifying sales opportunities, leading to a 25% improvement in cross-selling of banking products.