

SAYAK MUKHERJEE



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City-Kolkata

Address: 162/D/683, Lake Gardens

Pin Code-700045

Date Of Birth-03-10-1994

OBJECTIVE-Sayak aspire to develop career as a Research Analyst at leading Investment bank, Asset Management Company, & Portfolio Management services.

CAREER SUMMARY-

- **Bajaj Capital Ltd.**-Portfolio Management & Investment Advisory services to HNI clients through financial planning & analysis.
- **ICICI Bank**-Relationship Management along with customer acquisition by providing effective banking solutions.
- **ADB Logistics Pvt.Ltd.**-Maintaining daily Accounting & Taxation matters
- **AFM Advisory**-Securities analysis including Fundamental & Technical analysis of Stock, Commodity, & Cryptocurrency.

SKILLS-

- ❖ Relationship management
- ❖ Risk Management
- ❖ Financial Planning
- ❖ Wealth Management
- ❖ Negotiation
- ❖ Advanced Excel
- ❖ Critical Thinking
- ❖ Equity Derivatives
- ❖ Currency Derivatives
- ❖ Power BI
- ❖ Advanced Excel
- ❖ UI-Path Studio (Automation)
- ❖ SPSS
- ❖ Portfolio Management
- ❖ Equity Research
- ❖ Tax Planning
- ❖ Market Research
- ❖ Customer Due Diligence
- ❖ Python

WORK EXPERIENCE-

2 Years

Bajaj Capital Ltd.**Designation-**Wealth Manager

[From 7-12-2023 till Now]

Grade-Assistant Manager**Location-**Kolkata**Job Responsibility-**

- ❖ Financial solutions provided to HNI clients through Mutual Funds, Insurance, PMS, Bonds, Corporate FD, & AIF.
- ❖ New Customer acquisition by generating AUM & revenue through effective financial planning.
- ❖ Providing customer service through filling KYC, FATCA, Nomination, & Bank change forms.
- ❖ Conducting marketing activities & events at society & generating leads through referrals & networking
- ❖ Managing portfolio of HNI & NRI clients through Retirement planning, Tax Planning, Child Education planning, & Cash Flow Analysis
- ❖ Key achievements include highest revenue generation in the team by cross selling ULIP plans to NRI client & AUM generation of HNI clients among new joiners.
- ❖ Handling customer queries through NAV calculations, TDS calculations, Funds Selections & prudent financial advice.

ICICI Bank Ltd.

[From 8-06-2022 till 30.10.2023]

Designation-Relationship Manager (Retail Banking)**Grade-**Deputy Manager-1**Location-** Kolkata**Job Responsibility-**

- ❖ Cross selling financial products such as CASA, Deposits, Loans & fees-based products like Mutual Fund, Life Insurance, & Demat
- ❖ Develop new relationship by customer acquisition around 30 to 40 per month consist of various segments like self-employed, salaried & senior citizens through networking & references.
 - ❖ The customer onboarding also generates HUF opportunities which leads to CASA pooling around 3to 5cr in YTD.
 - ❖ Achievements includes highest HUF A/c opening & successfully opened first digital HUF A/c in the branch.
- ❖ Providing efficient customer service by handling queries & updating Re-kyc, nominee & other demographic changes like updating registered mobile no, pan no.& other A/c details such as address change.
- ❖ Conducting day to day branch operations like BOD & EOD activities. Cash Management services involve handling 30 to 40lakhs of cash at teller per week. Managing remittance & indent of new currency notes.
- ❖ Supporting Internal Audit functions of branch such as providing necessary reports, documents, & details regarding transactions, inventories, & other compliance related procedures.
- ❖ Processing of financial transactions like NEFT, RTGS, fund transfer, Demand draft, & generating eod reports of branch using Finacle.
- ❖ Maintaining deliverables like cheque book, debit cards& certificates both physically & as per system through Deliverable Management Portal.
 - ❖ Relationship Management with a pool of 300 existing customer base, which involves 100 salaried segment,70 senior citizens, 60 self-employed & 70 Affluent segment like HNI & NRI customers by providing personalized service & cross selling products like FD, SIP, demat, Life Insurance, Loans, etc.
 - ❖ Conducting AML checking while onboarding of new customers by adopting customer due diligence & enhanced due diligence.
 - ❖ Collaboration with internal stakeholders like BLG, SMEG, Loan Segment, etc. to deliver effective solutions and strategy for target customers.
 - ❖ Reconciliation of branch inventories like certificates, cheque book, debit cards & gold ornaments, both physically & as per System.
 - ❖ Customer engagement to enhance digital penetration in managed base using various tools like mobile app, corporate & individual Net Banking, & What's App banking.

- ❖ Conducting sales promotion by providing support in marketing campaigns launched by marketing department to enhance awareness on product portfolio
- ❖ Creation of Broadcast groups for separate customer segments & sharing promotional information regarding product portfolio.
- ❖ Conducting sales strategy like providing attachments like POS, QR code, Tally plug in to the current account customers & providing demat & other facilities to Savings account customers for CASA pooling in managed base
 - ❖ Enhancing FD penetration in managed base by conducting sales pitch for FD
 - ❖ Customer engagement by sharing promotional information & conducting sales calling through VRM portal

ADB LOGISTICS PVT.LTD. -

[From 01-02-2018 To 31-10-2018]

Job Responsibility: -

- Maintaining daily accounts using TallyERP9.0
- Tracking expenditures and receivables
- Tax computation and following compliance procedures along with filling GST returns.

AFM ADVISORY-

[From 16-05-2021 To 10-07-2021]

Designation-Summer Intern**Project Title-**Analysis of banking stocks of Indian stock market**Job Responsibility-**

- Fundamental & Technical analysis of stock, commodities, forex, and cryptocurrencies.
- Fundamental analysis involves various tools like Ratio Analysis, cash flow & fund flow statements, Corporate Governance.
- Technical Analysis involves analyzing technical charts like pie chart, bar chart, Candlesticks, etc. to predict the pricing pattern of various asset class using tools like Support & Resistance, Relative Strength Index (RSI), Bollinger Bands, Moving Average.
- Daily market reviews to corporate mentor regarding prediction on various asset class.
- Interaction with clients & providing efficient financial solutions.

EDUCATIONAL QUALIFICATION-

2020-2022	PGDM	Finance & Information System	Globsyn Business School	60%
2015	B.COM(H)	Accounting & Finance	Calcutta University	60%
2012	CA Foundation	Accounting	ICAI	60%
2012	Class X11	Commerce	Swami Pranavananda Vidyapith	76%
2010	Class X	General	Nava Nalanda High School	60%

CERTIFICATIONS & PARTICIPATIONS-

1. Globsyn Business School-International Vision Seminar
2. JP Morgan Chase & co.- Financial Market Virtual Experience
3. IRDA- Insurance Regulatory Development Authority
4. Dissertation Project- "Impact of ESG Score on Stock Return in Indian Context"
5. NISM-Mutual Fund Distributors Certification-VA
6. NISM-Equity Derivatives (Series-V111)

ACTIVITY & INTEREST- Travel, Art & Music**OTHER INFORMATION-**

Soft Skills	Commercial awareness, Critical Thinking, Leadership, Data Analysis, & Problem Solving
Languages Known	English, Bengali, Hindi

