

AMIT KUMAR DUBEY

R 15/16, Vikas Nagar, Uttam Nagar

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SUMMARY

Have gained experience in highly challenging Equity, Derivative, Mutual Fund and Currency Markets.

Extensively worked on financial product handling.

Possess good analytical skills and can work cross-functionally.

Worked on a wide range of Investment advising and client handling.

Currently working with one of the largest broking companies of India: Kotak securities ltd, as an Equity Advisor, Managing HNI and retail clients from all over the country.

PROFESSIONAL EXPERIENCE

. 1 Period : From 8th Oct 2024 – Till date

Organization : Globe capital Market Ltd

Designation : Branch .Manager

RESPONSIBILITIES

- * Handling of clients, client acquisition.
- * Maintaining healthy relation with all the clients.
- * Dealing in equity and currency clients.
- * Handling clients through online & offline trading
- * Cross selling of other product
- * Handling 7 members team

2. Period : From Nov 2022 – Oct 2024

Organization : Anand Rathi Share & Brokers Ltd (PCG)

Designation : Sr.Manager

RESPONSIBILITIES

- * Handling of clients, client acquisition.
- * Maintaining healthy relation with all the clients.
- * Dealing in equity and currency clients.
- * Handling clients through online & offline trading
- * Cross selling of other product

3. Period : From OCT 2021– October 2022

Organization : Kotak Securities Ltd

Designation : Manager

RESPONSIBILITIES

- * Handling of clients, client acquisition.
- * Maintaining healthy relation with all the clients.
- * Dealing in equity and currency clients.
- * Handling clients through online & offline trading
- * Cross selling of other product
- * Handling 7 members team as a mentor

4. Period : From, December 2016– Sep 2021

Organization : Motilal Oswal Financial Services Ltd.

Designation : Assistant Manager - Dealing

RESPONSIBILITIES

- * Handling of clients, client acquisition.
- * Maintaining healthy relation with all the clients.
- * Dealing in equity and currency clients.
- * Handling clients through online & offline trading

5. Period : From Oct 2015– NOV 2016

Organization : Religare Securities Ltd.

Designation : Sr. Relationship Manager

RESPONSIBILITIES

- * Handling clients through online & offline trading.
- * Handling team of 5 relationship managers.
- * Selling of cross product also.
- * Client Acquisition.
- * Client Portfolio Management.
- * Maintain healthy relationship with clients.

6. Period : From 1st MARCH, 2012– sep 2015

Organization : Sharekhan Securities Ltd.

Designation : Equity Dealer

RESPONSIBILITIES

- * Handling clients through online & offline trading.
- * Client Acquisition.
- * Client Portfolio Management.
- * Maintain healthy relationship with clients.

EDUCATIONAL QUALIFICATIONS

Certifications.

- * NISM Certification in Derivative Module
- * NISM Certification in Currency Derivative Module
- * NISM Certification in Mutual Funds Module

Academic

- * B.A (Arts) from Mahatama Gandhi Kashi Vidyapith University
- * Intermediate from U.P. Board
- * Matriculation from U.P. Board

Career Objective

To work in challenging environment and be a key & responsible team member for the organization and give my best to attain the excellence.

PERSONAL PROFILE

Father' s Name : Mr. Anil Dubey

Date of birth : 20 July 1990

Marital Status : Married

Language Known : English, Hindi

References to be furnished on demand.

Date :

Place :

(AMIT KUMAR DUBEY)