

PRIYA KOTAK

Contact Details

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Address

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Project

Equity Mutual Fund

I had made detailed project on equity mutual fund, where I had written about structure of mutual fund, process of investing in mutual fund, advantage & disadvantage, mode of investment, types of schemes, active and passive investment, types of transactions, regulator of mutual fund.

Certification

BSE INSTITUTE **2016 – 2018**
Global Financial Market Professional (GFMP)

NSE INSTITUTE **2020**
NISM Series-V-B: Mutual fund Foundation

NSE INSTITUTE **2022**
NISM-Series-II-A: Registrars to an Issue and Share Transfer Agents - Corporate Certification Examination

Skills

Microsoft Office
Effective Communication Skill
Team Work

Experience

➤ **Link In Time - Associate Client Relation** **March 2022 – June 2022**

- Processing activities like Stop Removal, Duplicate, Replacement and Exchange of physical shares.
- Coordinating with clients regarding their queries and requirements.
- Prepared verification reports of IEPF and processed the same.
- Generate XBRL and other reports as per requirements of clients.

➤ **ACE FN Supermarket - Mutual Fund Operation Executive** **June 2021 – Feb 2022**

- Fund administrative service managing and processing investment funds by handling financial paperwork.
- Verify the KYC status of all the holders.
- Coordinating with AMCs & RTAs.
- Quarterly review of client's portfolio.
- Maintain database on regular basis.
- Communicating with clients regarding investments and resolving their queries.

❖ **Internship** **Assistant Dealer at Nariman Finvest** **April 2016 – May 2016**

- I have learnt about stock market
- How to place an orders
- Handling clients
- Communicating with clients regarding their queries.
- Provide confirmation to clients on order status and trade status.

Education

Mulund College of Commerce **2015 – 2018**
BFM (Bachelor in Financial Market) - 60%
S.K. Somaiya of Arts, Science & Commerce **2014 - 2015**
Higher Secondary Certificate - 71.08%
S.M.P.R School **2012 - 2013**
Secondary School Certificate - 74.20%