

DHWANIL BHATT

Aspiring Investment Banking Operations Professional

Mobile No:- 8169890859 | E-mail: dhwanilbhatt@gmail.com

ABOUT :

An aspiring investment banking professional with a certificate in IB Operations from Imarticus Learning. Possess knowledge related to Operation and Derivatives. Additionally skilled in interpersonal, team work, management, problem-solving, and decision making. Looking forward to utilizing these skills in the investment banking industry.

WORK EXPERIENCE:-

Name of Company	ICICI PRUDENTIAL ASSET MANAGEMENT COMPANY
Designation	Mutual Fund Advisor
Duration	June 2022 – March 2023
Areas of Responsibility	<ul style="list-style-type: none">• Developing relations with UHNI and guiding them with the investments in mutual funds.• Deep understanding of concepts of financial planning starting from data gathering to closure.• Strong customer relationship management skills and ensure improved customer retention levels.• Proficient in all phases of the sales process from qualifying prospects to after sales services.
Name of Company	MOTILAL OSWAL FINANCIAL SERVICES LIMITED
Designation	Investment Advisor - Derivatives Trader
Duration	Dec 2021 – May 2022
Areas of Responsibility	<ul style="list-style-type: none">• Developing relationship with existing clients and enrolling new clients through own and company resources.• Devise investment strategies for clients based on the risk appetite.• Trading in Derivatives on behalf of clients.• Generate revenue and selling of Investment Portfolios to HNI clients.

TECHNICAL ABILITIES:

MS Office (Excel, Word, Outlook)

SKILLS:

- CRITICAL THINKING
- TECHNICAL ANALYSIS
- ADAPTIVE
- TEAM PLAYER

EDUCATIONAL QUALIFICATION:-

Year	Course & Institute	Location
2022- 2023	Imarticus Learning <ul style="list-style-type: none">• Certified Investment Banking Operations Professional (In Progress)<ul style="list-style-type: none">○ Securities and Derivatives.○ End to end Trade life cycle of Listed and OTC products.○ Functioning of Clearing and Settlement systems.○ Asset Management.○ Risk Management.	Mumbai, India
2018 -2021	<ul style="list-style-type: none">• BACHELORS IN FINANCIAL MANAGEMENT (BFM) LALA LAJPATRAI COLLEGE OF COMMERCE AND ECONOMICS Grade : A+	Mumbai, India

ADDITIONAL QUALIFICATIONS / CERTIFICATIONS:

- NISM VA : CERTIFIED MUTUAL FUND DISTRIBUTORS
- NISM VIII: EQUITY AND DERIVATIVES
- J.P.Morgan : INVESTMENT BANKING VIRTUAL EXPERIENCE