

PRAKHAR PATIDAR

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Summary

With a seasoned 5-year tenure, I am an accomplished Financial Advisor and Mutual Fund Distributor well-versed in navigating stock markets. My proven track record showcases proficiency in offering comprehensive financial guidance, implementing strategic mutual fund solutions, and providing insightful stock market analysis. I am dedicated to ensuring clients' financial success and fostering sustainable growth.

Experience



Financial Advisor

Ten Quints Fintech Pvt. Ltd.

Jan 2023 - Present (1 year 2 months)

1. Spearheaded the development of financial advisory tools and calculators for a startup, enhancing user engagement and financial planning capabilities.
2. Led comprehensive marketing efforts, including SEO strategies, resulting in increased online visibility.
3. Successfully crafted and managed website development, optimizing user experience.
4. Established and managed social media accounts, driving brand awareness and audience engagement.



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Self Employed

Jan 2021 - Nov 2022 (1 year 11 months)

1. Executed equity trades, implementing tactical decisions for optimal results.
2. Conducted in-depth market trend analysis, identifying opportunities and mitigating risks.
3. Offered strategic investment recommendations, aligning portfolios with client goals.
4. Enhanced client wealth through meticulous planning and rigorous research.
5. Ensured compliance with financial regulations, upholding ethical standards.

Managing Director

Patidar constructions

Oct 2020 - Jun 2023 (2 years 9 months)

1. Worked in my father's construction company, gaining hands-on experience in project management and site supervision.
2. Collaborated with construction teams, ensuring smooth workflow and timely project completion.
4. Developed skills in budgeting, resource allocation, and client communication.
5. Acquired a deep understanding of the construction industry's intricacies.

Education



Symbiosis Centre for Distance Learning

Master of Business Administration, Finance, General
2023 - 2025



Brihan Maharashtra College Of Commerce

Bachelor of Business Administration - BBA, Finance
2017 - 2020

Licenses & Certifications



Mutual Fund Distributor - National Institute of Securities Markets (NISM)



Investment Advisor - National Institute of Securities Markets (NISM)

Skills

Microsoft Office • Microsoft Excel • Microsoft PowerPoint • Financial Analysis • Zoho CRM • Zoho Projects • Zoho Creator Low-Code Platform • Canva • Equity Research