**OBJECTIVE**

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| Results-driven financial services professional with **8+ years of experience** **in broking franchisee business development, financial product sales (MF, PMS, Algo), and financial advisory.** Skilled in enhancing franchisee performance through market knowledge, strategic product support, engagement activities. Proficient in **cross-selling financial products**, **conducting large-scale webinars/seminars**, and **team performance and business analysis**. Passionate about leveraging data driven strategies and innovative solutions to drive **business expansion and revenue growth**. |

**PROFESSIONAL EXPERIENCE**

**Motilal Oswal Financial Services Limited**

Manager – (Jan 2016 – July 2024)

* **Led franchisee business growth**, identifying key opportunities and providing strategic guidance to enhance performance.
* Conducted **large-scale fundamental seminars** and **multiple webinars** to educate franchisees and clients, driving higher product adoption and engagement.
* Designed and implemented tailored financial product strategies, focusing on **MF, PMS, Algo, and other broking products, Derivative Strategies.**
* Coordinated effectively with the **AMC, Product/Sales RM, Backend teams and franchisees** to facilitate knowledge-sharing and drive financial product expertise.
* Implemented **marketing strategies** to enhance franchisee presence and brand recognition and coordinated with our marketing team regularly for new ideas.
* Designed and managed **MIS reports** for sales performance tracking, data analysis, regular monitoring and strategize growth planning.
* Implemented strategies for **new client acquisition** and **reactivation of inactive clients.**
* **Managed HNI clients**, advised trading strategies and customized Investment recommendations **based on client objectives**, risk tolerance and MOFSL advisory
* **Regularly travelled** to AP/Telangana/Karnataka to engaged with franchisees and their clients for strategies discussion and market outlook.
* Actively participated in **MO Toastmaster Club** for one year enhancing public speaking and leadership skills.

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| **SKILLS, ABILITIES** | |
| MS Excel/PowerPoint/Word | Decision Making |
| Sales & Marketing | Adaptability |
| Strategies for Business development | Positive Attitude |
| Market Research and Analysis | Service Orientation |
| Time Management | Team Management |
| Options & Derivatives | Integrity & Work Ethics |
| Relationship Building | Good Communication |

**EDUCATIOAL QUALIFICATIONS**

**Full Time MMS Finance** (Master in Management Studies) - GNVS Institute of Management ‘2014-16’

**B.Com** - Mumbai College of Arts Commerce and Science – University of Mumbai, 2014

**H.S.C** - Mumbai College of Arts Commerce and Science – Maharashtra University, 2006

**S.S.C** - Shri Sanatan Dharam High School - Maharashtra University, 2006

**PERSONAL INFORMATION**

Date of Birth - 10/07/1989

Languages - English, Hindi, Marathi

Address - H 207, Prem Gali, Sangam Nagar, Salt Pen Road, Antophill, Wadala, Mumbai-400037.

Yours faithfully.

(Satyendra Fulchand Yadav)