

# KALPESH ANAND SHINDE

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## **OBJECTIVE**

Seeking a challenging position in a progressive organization with an aim to contribute positively towards the achievement of its objectives to the best of my capabilities and to develop and improve my professional skills

## **PROFESSIONAL QUALIFICATION**

- Bachelors of Commerce Passed in 2008
- Appearing Master of Finance & Banking From PTVA College at Mumbai
- Passed Capital Market (Dealers module) from NCFM in 2009
- Passed Derivative Market & currency Market (Dealers module) from NCFM in 2010.
- Passed English Typing G.C.C. Exam 30 w.p.m. with 'A' Grade
- Certified MS Office
- Completed Ms - CIT Exam in Year 2002 - 03.

## **EXPERIENCE**

- From Mar 2008 Till Mar 2010 Worked with Angel Broking Ltd. as a Financial Advisor in India
- From Mar 2010 Till April 2014 Worked with HDFC Securities Ltd as a Financial Advisor in India
- From April 2014 Till August 2019 Worked with Kotak Securities Ltd. as a Assistant Manager in India
- From Feb 2020 Till Feb 2024 Worked with National Stock Exchange of India as a Senior Finance Associate in India

## **Duty Responsibilities:**

- Managing the Risk Management
- Sorting out problem of the clients
- Giving guidance relating to software to junior executive and clients
- Giving guidance to Branches regarding Trading and about various Products
- Giving solution regarding file uploads in system at member/broker level
- Updating about Pay-out / pay in process settlements related query at member / broker level
- Giving solution regarding system files EPI FILES ,MG13 FILES ,CPD FILES at member/broker level
- Giving information regarding Funds debit/credit related query in their respective accounts at member/broker level
- Engage with Customer through Email and calls who need Forex Products
- Giving Guidance about Choose a currency pair to trade
- Decide whether to buy or sell
- Monitor Position
- Manage & Updated Client Portfolios and built and moistened client base.
- Contacted Client Regularly to discover changes in their financial status
- Maintained contact with clients in order to obtained feedback as well as monitor the progress of client finances

### **PERSONAL PROFILE**

Passport No : X8329416  
Passport Expiry : 27/04/2033  
Vista Status : Visit Visa  
Languages Known : English, Hindi, Marathi. Gujarati  
Nationality : India  
Place Of Birth : Surat Gujrat  
Gender : Male

### **DECLARATION**

I hereby declare that the above-furnished details are true to the best of my knowledge.

**Kalpesh Anand Shinde**