Shubham Baheti



MBA (Finance & Marketing) | B.Com.

**Education**

**Contact**

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Aurangabad, Maharashtra

# Skills

* Good communication and soft skills.
* Ambitious, Enthusiastic, Quick learner, Creative and dedicated to work.
* Leadership Quality and Smart worker.
* Expertise in MS Excel, MS Word, MS PowerPoint.
* Financial Analysis.

# Strengths

* Excellent interpersonal skills
* Knack of dealing with clients
* Active listener & quick learner
* Leadership qualities
* Attention to details

# Language

* Professional level English and Hindi
* Regional language Marathi

# Personal Details

DOB: 24-March-1996.

Gender: Male

Extracurricular interests: Traveling, Playing Chess.

Communicative and eager individual looking for a consulting business analyst position with Finance and Marketing where I can utilize my experience and skills to identify issues and develop creative solutions to improve revenue and operations.

MBA in Finance & Marketing (RTM Nagpur University) from Dr. Ambedkar Institute of Management Studies and Research, Nagpur, with 69 % in 2020

B. Com from (Savitribai Phule Pune University) with Krishna Education Foundation Leelawati College of Commerce and Computer Studies, Pune, 60 % in 2017.

12th from Maharashtra State Board with 82.15% in 2014.

10th from Maharashtra State Board with 71.27% in 2012.

# Work Experience

**Unit Manager- (Oct 21- January 24) (Aurangabad – Maharashtra)**

**HDFC Asset Management Company Ltd Deputed By Randstad India Pvt Ltd**

* Learning and development Phase of my Career where I have gained knowledge of Mutual Funds Industry
* Distribution Channel Management- Handling Banks, National Distributors (ND’s) and MFD’s.
* Maintaining good relations with clients to drive business.
* All designated Sales, Marketing and promotional activities.
* Promoting schemes of mutual fund in order to achieve targets.
* Handling Post Sales queries from channel partners as well as investors.

# Work Experience

**Sales Executive- (January 2024- Present) (Aurangabad – Maharashtra)**

**HDFC Asset Management Company Ltd**

* Trains co-associates and branches on new system enhancements
* Provide high value service to internal and external clients in an environment that promotes Baird’s culture and the Operations mission and values statement
* Ensure adherence to regulations, Baird policies, and department procedures and policies
* Answer and/or initiate Financial Advisor and Client Specialist contact; answer routine questions and follow through on requests
* Contribute to productivity, efficiency and effectiveness improvements to drive exceptional client service and risk mitigation
* Work on special team projects or support other team members in their efforts
* Review, approve, and process transactions and activity while adhering to strict deadlines to prevent market exposure and loss potential to clients, Reps, or Baird

* Monitor and evaluate all activity promptly for accuracy and take corrective action to rectify errors while escalating any issues appropriately
* Identify opportunities and make recommendations for process or policy changes to mitigate risk or to increase productivity, efficiency, and effectivenes

# Awards & Achievements

* Secured 1st position in Company Analysis held at Falcon Festival conducted by G.S. College, Wardha.
* Participated in Paper Presentation Competition on the topic “The Current Trend of Aviation Sector in India.
* Participated in Credit Research Challenge 2018-19.
* Activated Dormant IFA’s and Increased market share of ND’s

# Certifications

* NISM V-A Mutual Fund Distributor (Level-1)
* NISM V-C Mutual Fund Distributor (Level-2)
* Negotiation Skills (Courser-Macquarie University)