



ANKIT KUMAR SINGH

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Objective

To make a mark in Finance industry by putting best of efforts, knowledge and Analyzing skills.

Experience

Nuvama Wealth
Associate Manager
07/2022 - Current

- Relationship Management- Building and maintaining strong client relationships, Understanding their evolve financial goals and serving as their primary point of contacts.
- Investment Management- Providing expert investment advice, conducting market research, developing diversified portfolios, Manage assets and rebalancing based on client goals and market conditions.
- Compliance and Ethics- Adhering to regulatory guidelines and ethical standards to ensure transparency and Trust.
- Risk Management- Assessing and mitigating financial risks through various strategies like Insurance and diversification to protect the client wealth.

Academic Record

Sri Guru Ram Rai Public School | Dehradun
H.S.C

Sri Guru Ram Rai Public School | Dehradun
S.S.C

Lovely Professional University | Punjab
B. Tech in Electronic & communication Engineering
GPA: 6.3

NIIT
Wealth Management Specialized course

Proficiency

- Equity Dealing
- Unlisted Shares
- Structure Product
- Mutual Funds
- Bonds
- Guaranteed Income
- PMS and AIF
- Portfolio diversification

Certifications

- NISM Series V 'A' Mutual fund distributors Certificate.
- NISM Series VII Securities Operations and Risk Management certification.
- NISM Series VIII Equity Derivatives Certification.

Languages

- English
- Hindi

Awards

- Certificate of completion of Expert level wealth management in ELEVATE program.
- Pattaya qualifier in Insurance Contest in 2024.
- Almaty qualifier in Insurance Contest in 2025.
- Certificate for Achieving highest numbers of unique client meeting.
- Got Excellence star for best performing employee.
- Best supporting award from HDFC LIFE and BAJAJ ALLIANZ Life Insurance Company.
- Promoted to Associate Manager from Jr. Associate.

Hobbies and Interests

- Reading Newspaper
- Playing online games
- Cooking

Personal Information

- Father's Name: Mr. Pratap Singh
- Mother's Name: Mrs. Rekha Singh

Disclaimer

- I hereby declare that all the above given information is true to best of my knowledge and concern.