



ANJALI SINGH

Portfolio Manager

19/01/1998
 Female
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SKILLS

Generating an Investment Policy Statement, outlining our clients' investment objectives.

Strong communication and networking skills

Determine the risk involved in insuring a client

Good experience in managing client portfolio

Sound knowledge of asset management and financial modeling techniques

Wide knowledge of client relationship management procedures

INTERESTS

- Investment Banking
- Equity derivatives
- Insurance Operation
- Underwriter



OBJECTIVE

Seeking a career to utilize my knowledge, personal skills to gain comprehensive understanding at a reputed organization so as to take responsibility and contribute significantly.



WORK EXPERIENCE

BAJAJ ALLIANZ LIFE INSURANCE CO.LTD

MARCH 2020 - NOW

Portfolio manager

- Provided investment advice and recommendations to clients via phone conversation/face-to-face meetings and/or written communication.
 - Analyzed the stock, bond and mutual fund mix in a client's portfolio to ensure that the asset allocation met their stated investment objective.
 - Responsible for the training and development of three new Portfolio Managers to our investment policies and practices.
 - Decreased risks in the portfolios by diversifying thru the use of various investment vehicles.
- Role - Account creation Financial leadership Investment

EDELWEISS TOKIO LIFE INSURANCE COMPANY LTD.

APR 2019 - FEB 2020

Assistant financial Executive

Handle to customer queries and providing solutions as a pre underwriter.



PROJECT

SHAREKHAN PVT LTD

MAY 2018 - JULY 2018

Study of risk and return portfolio Management.

Online Share Trading and Stock Market.



EDUCATION

ABES ENGINEERING COLLEGE GHAZIABAD

JULY 2017 - JUNE 2019

MBA

75%

IIMT ALIGARH

JULY 2014 - JUNE 2017

BBA

66%

MK INTER COLLEGE BULANDSHAHR

JULY 2013 - JUNE 2014

12th

64%

MK INTER COLLEGE BULANDSHAHR

JULY 2011 - JUNE 2012

10th

65%

- Stock markets