

AKHIL TRIVEDI MBA, IIM Amritsar B.Tech, IIT Kanpur 6.5+ yrs. of work-exp Phone : +91-9265027521; 9452000883 AR Wealth Limited Canara Bank (Banking & Financial Services) Email : akhiliiim@gmail.com Hitachi Consulting (Oracle EBS) Surya Roshni Ltd. (Manufacturing & FMCD) akhilt04@iimamritsar.ac.in			
EDUCATION			
M.B.A.	2018-20	Indian Institute of Management Amritsar (IIM Amritsar)	3.58/4.33
B.Tech. (M.M.E)	2005-09	Indian Institute of Technology Kanpur (IIT Kanpur)	5.4/10
Class XII (ISC)	2001-02	V.S Education Centre, Kanpur	80.20%
Class X (ICSE)	1999-00	V.S Education Centre, Kanpur	84.00%
WORK EXPERIENCE			
Anand Rathi Wealth Limited			Jan'21 – Present
Portfolio Accounts Manager	Wealth Management and Financial Advisory with net AUM INR 740+ Crores (MF's & Derivatives) <ul style="list-style-type: none"> • Providing Wealth Management and Financial Advisory services to UHNI/HNI clients. • Portfolio Management and Restructuring to generate alpha over the sector specific standard benchmark. Portfolio GAP analysis. Markowitz Model Portfolio Recommendations. • Advisory services to clients to generate wealth with minimum risk and maximum returns within a set time frame. Mutual Fund performance analysis and selection of funds • Risk mitigation via Portfolio Audit. Diversification of risk via asset categorization. • Preparation and execution of Portfolio re-alignment plan according to the market trends. • Advisory for Trust, Estate and Will planning to transfer wealth to the next generation. 		
Canara Bank			Dec'15 – Jun'18
Probationary Officer	Worked as Probationary Officer in the General banking and Banking Administration Divisions <ul style="list-style-type: none"> • Worked in leading Public Sector Bank of India with Total Assets worth \$86 Billion and Net Worth \$12 Billion. Deputy Branch Lead Handling Risk, Marketing & Product functions. • Responsible for Marketing (B2B, B2C & D2C) of third-party products (Bancassurance, MF's, etc.). Sourced & converted the leads thereby contributing towards the non-interest income of the bank. Wealth/Portfolio advisory and management of HNIs. Upselling & Cross-selling. • Handling & reconciliation of the Forex business of the branch. LC's, BG's, Channel financing. • Digital Marketing & Product Manager of the Technical products/apps offered by the bank and contributing towards digitization at the customer's end. People Management. • Supervised and successfully managed the e-Lounge consisting of Cash and non-cash Kiosk machines and timely resolving the customer queries. Implemented Operational Excellence. • Follow-up of the Special watch list & Non-Performing Assets. Risk Management & Hedging. • Monitored and reviewed the SME accounts. Handled the OTC derivatives business. • Analyzing CIBIL reports and KYC documents of customers for recommendation of advances. • Inspection of Stocks and verifying the Stock-statements reports of the borrowers. • Marketing, sourcing, appraisal, sanction and disbursement of retail loans to customers. • Organized CASA / Retail loan camps via leading a team of 8 members. Risk rating of assets. 		
Consultant (Materials & Corrosion) & Commodities Trader			April'13 – Nov'15
Technical Consultant & MCX Trader (Oil, NG & Bullion)	<ul style="list-style-type: none"> • Technical Consultant in Materials & Corrosion engineering domain. • Materials & Corrosion Engineering consultant to Petrofac, Sharjah (U.A.E.) for the upstream oil & gas green field project during Nov-2015. Review of material and vendor selection. • Failure analysis and Stress analysis. Quality Performance review & Process Improvement. • Corrosion Risk Assessment Study and Corrosion Monitoring. Operational Excellence. • Review of MSD, MSR, P&IDs, HMB, PMS. Monitoring cost control via Material selection. • MCX trader in the Oil, NG and Bullion segments. • Successfully analyzed & implemented the trading strategies in accordance with the global trade & policies. • Equity Research, Industry/Competitor analysis, SWOT & Company/Equity Valuations. 		

Hitachi Consulting		Sep'10 – Mar'13
Consultant	<p>Worked as Functional Consultant (Manufacturing & Distribution) of Oracle E-Business Suite</p> <ul style="list-style-type: none"> • Coordination & Management with the onsite and offshore team to successfully implement the Supply Chain Management (SCM) module of Oracle E-Business Suite at the client's site. • Supervised and lead the post implementation support to the client's businesses for ERP. • Implementation of Procure to Pay and Order to Cash modules. Handling the customers P&L. Responsible for customer satisfaction, upselling & cross-selling. Delivering value. • Experience in Oracle Process Manufacturing, Discrete Manufacturing, Inventory Management & CRM. Reduced the churn rate for clients via CRM. • Active Member of the Corporate Social Responsibility team. 	
Surya Roshni Limited		July'09-Aug'10
Management Trainee	<p>Worked as Management Trainee at the Corporate office and Steel & Lighting Divisions</p> <ul style="list-style-type: none"> • Managing the metallurgical & corrosion engineering aspects at Surya Roshni Limited. • Carried out Market research on the quality and cost of hot rolled coils. This became the benchmark with best practices for procurement of hot rolled coils from the vendors. • Reviewed & revised the Vendor selection framework and implemented JIT and Kaizen. • Analyzing the MIS reports and handling TQM, TPM, SCM, Kanban and Lean Management. • Member of the corporate team of CMD. Managing the Greenfield & Brownfield projects. • Member of the CSR team. Spread awareness about sustainable development. 	
ACADEMIC DISTINCTIONS		
IIM AMRITSAR	<ul style="list-style-type: none"> • 4th Rank in the institute securing 91.80%. Dean's List. • Risk Management Intern at BA & Co. , Apr'19 - May'19. -Analysis and Auditing of Financial Data of Companies and Banking Sector viz. Statutory/ Concurrent/Risk Audit, Due Diligence. Lead a two-member team & conducted Internal Audit of World Bank Project worth \$100 million. Identified the Project specific risks. • Research Project: Forecasting the impact of economic crimes on economic growth. -Fixed effects regression on panel data recommended that economic crimes flourish in the periods of economic growth in India. Economic crimes also grow with GDP growth. 	
IIT KANPUR	<ul style="list-style-type: none"> • All India Rank of 901 amongst 2.25 Lac candidates in JEE (Pre) -2005 conducted by IITs. • Research Project at University West, Sweden sponsored by Volvo Aero, May'08-Jul'08 -Microstructural Quantification of Ti-64 alloy. Forecasted the various failures & developed method for calculating defects & reducing errors. 	
Positions of Responsibility		
Credit Monitoring Officer Canara Bank	<ul style="list-style-type: none"> • Monitoring the quality of assets for high value advances. • Stock Verification, Documentation, Mid-Term Review and Unit Inspections. 	2018
Team Leader Surya Roshni Limited	<ul style="list-style-type: none"> • Lead 3-member team of fellow IIT graduates at the Management Training Camp at Surya Foundation. 	2009
Awards & Achievements		
Co-Curricular	<ul style="list-style-type: none"> • Qualified for Silver Round of MCX IPF Comquest'19 at PAN India level. 	2019
	<ul style="list-style-type: none"> • Certificate of Excellence for performance in Management Training Camp. 	2009
	<ul style="list-style-type: none"> • Recipient of State Bank of India Scholarship on merit cum means. 	2009
Extra-Curricular	<p>Active Member of National Social Service (NSS) at IIT KANPUR.</p> <ul style="list-style-type: none"> • Worked in a team of 50 members to impart primary and secondary education to the children belonging to the disadvantaged section of the society, adult literacy and addressing the environmental issues. 	2005-06
	<ul style="list-style-type: none"> • Awarded Yellow Belt in Karate. 	2009
Technical Skills	<ul style="list-style-type: none"> • MS Excel/Access/Project/PPT/Word, SPSS, Minitab, Google Analytics/Ads/Sheets, PL/SQL, SQL, Tableau, R, Python, Bloomberg, VBA, Java, C++, C, Linux, Oracle EBS, ERP, ECE-4, SEM 	