

[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 : [akhiliitiim@gmail.com](mailto:akhiliitiim@gmail.com)

Hitachi Consulting (Oracle EBS) | Surya Roshni Ltd. (Manufacturing & FMCD)

[akhilt04@iimamritsar.ac.in](mailto: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	<b>Wealth Management and Financial Advisory with net AUM INR 740+ Crores (MF's &amp; Derivatives)</b> <ul style="list-style-type: none"> <li>Providing Wealth Management and Financial Advisory services to UHNI/HNI clients.</li> <li>Portfolio Management and Restructuring to generate alpha over the sector specific standard benchmark. Portfolio GAP analysis. Markowitz Model Portfolio Recommendations.</li> <li>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</li> <li>Risk mitigation via Portfolio Audit. Diversification of risk via asset categorization.</li> <li>Preparation and execution of Portfolio re-alignment plan according to the market trends.</li> <li>Advisory for Trust, Estate and Will planning to transfer wealth to the next generation.</li> </ul>		
Canara Bank			Dec'15 – Jun'18
Probationary Officer	<b>Worked as Probationary Officer in the General banking and Banking Administration Divisions</b> <ul style="list-style-type: none"> <li>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 &amp; Product functions.</li> <li>Responsible for Marketing (B2B, B2C &amp; D2C) of third-party products (Bancassurance, MF's, etc.). Sourced &amp; converted the leads thereby contributing towards the non-interest income of the bank. Wealth/Portfolio advisory and management of HNIs. Upselling &amp; Cross-selling.</li> <li>Handling &amp; reconciliation of the Forex business of the branch. LC's, BG's, Channel financing.</li> <li>Digital Marketing &amp; Product Manager of the Technical products/apps offered by the bank and contributing towards digitization at the customer's end. People Management.</li> <li>Supervised and successfully managed the e-Lounge consisting of Cash and non-cash Kiosk machines and timely resolving the customer queries. Implemented Operational Excellence.</li> <li>Follow-up of the Special watch list &amp; Non-Performing Assets. Risk Management &amp; Hedging.</li> <li>Monitored and reviewed the SME accounts. Handled the OTC derivatives business.</li> <li>Analyzing CIBIL reports and KYC documents of customers for recommendation of advances.</li> <li>Inspection of Stocks and verifying the Stock-statements reports of the borrowers.</li> <li>Marketing, sourcing, appraisal, sanction and disbursement of retail loans to customers.</li> <li>Organized CASA / Retail loan camps via leading a team of 8 members. Risk rating of assets.</li> </ul>		
Consultant (Materials & Corrosion) & Commodities Trader			April'13 – Nov'15
Technical Consultant & MCX Trader (Oil, NG & Bullion)	<ul style="list-style-type: none"> <li>Technical Consultant in Materials &amp; Corrosion engineering domain.</li> <li>Materials &amp; Corrosion Engineering consultant to Petrofac, Sharjah (U.A.E.) for the upstream oil &amp; gas green field project during Nov-2015. Review of material and vendor selection.</li> <li>Failure analysis and Stress analysis. Quality Performance review &amp; Process Improvement.</li> <li>Corrosion Risk Assessment Study and Corrosion Monitoring. Operational Excellence.</li> <li>Review of MSD, MSR, P&amp;IDs, HMB, PMS. Monitoring cost control via Material selection.</li> <li>MCX trader in the Oil, NG and Bullion segments.</li> <li>Successfully analyzed &amp; implemented the trading strategies in accordance with the global trade &amp; policies.</li> <li>Equity Research, Industry/Competitor analysis, SWOT &amp; Company/Equity Valuations.</li> </ul>		

Hitachi Consulting		Sep'10 – Mar'13
Consultant	<b>Worked as Functional Consultant (Manufacturing &amp; Distribution) of Oracle E-Business Suite</b> <ul style="list-style-type: none"><li>Coordination &amp; 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.</li><li>Supervised and lead the post implementation support to the client's businesses for ERP.</li><li>Implementation of Procure to Pay and Order to Cash modules. Handling the customers P&amp;L. Responsible for customer satisfaction, upselling &amp; cross-selling. Delivering value.</li><li>Experience in Oracle Process Manufacturing, Discrete Manufacturing, Inventory Management &amp; CRM. Reduced the churn rate for clients via CRM.</li><li>Active Member of the Corporate Social Responsibility team.</li></ul>	
Surya Roshni Limited		July'09-Aug'10
Management Trainee	<b>Worked as Management Trainee at the Corporate office and Steel &amp; Lighting Divisions</b> <ul style="list-style-type: none"><li>Managing the metallurgical &amp; corrosion engineering aspects at Surya Roshni Limited.</li><li>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.</li><li>Reviewed &amp; revised the Vendor selection framework and implemented JIT and Kaizen.</li><li>Analyzing the MIS reports and handling TQM, TPM, SCM, Kanban and Lean Management.</li><li>Member of the corporate team of CMD. Managing the Greenfield &amp; Brownfield projects.</li><li>Member of the CSR team. Spread awareness about sustainable development.</li></ul>	
ACADEMIC DISTINCTIONS		
IIM AMRITSAR	<ul style="list-style-type: none"><li>4<sup>th</sup> Rank in the institute securing <b>91.80%. Dean's List.</b></li><li><b>Risk Management Intern at BA &amp; Co. , Apr'19 - May'19.</b> -Analysis and Auditing of Financial Data of Companies and Banking Sector viz. Statutory/ Concurrent/Risk Audit, Due Diligence. Lead a two-member team &amp; conducted <b>Internal Audit of World Bank Project worth \$100 million.</b> Identified the Project specific risks.</li><li><b>Research Project: Forecasting the impact of economic crimes on economic growth.</b> -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.</li></ul>	
IIT KANPUR	<ul style="list-style-type: none"><li>All India Rank of <b>901</b> amongst 2.25 Lac candidates in JEE (Pre) -2005 conducted by IITs.</li><li><b>Research Project at University West, Sweden sponsored by Volvo Aero, May'08-Jul'08</b> -Microstructural Quantification of Ti-64 alloy. Forecasted the various failures &amp; developed method for calculating defects &amp; reducing errors.</li></ul>	
Positions of Responsibility		
Credit Monitoring Officer Canara Bank	<ul style="list-style-type: none"><li>Monitoring the quality of assets for high value advances.</li><li>Stock Verification, Documentation, Mid-Term Review and Unit Inspections.</li></ul>	2018
Team Leader Surya Roshni Limited	<ul style="list-style-type: none"><li>Lead 3-member team of fellow IIT graduates at the Management Training Camp at Surya Foundation.</li></ul>	2009
Awards & Achievements		
Co-Curricular	<ul style="list-style-type: none"><li>Qualified for Silver Round of MCX IPF Comquest'19 at PAN India level.</li></ul>	2019
	<ul style="list-style-type: none"><li>Certificate of Excellence for performance in Management Training Camp.</li></ul>	2009
	<ul style="list-style-type: none"><li>Recipient of State Bank of India Scholarship on merit cum means.</li></ul>	2009
Extra-Curricular	Active Member of <b>National Social Service (NSS)</b> at IIT KANPUR. <ul style="list-style-type: none"><li>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.</li></ul>	2005-06
	<ul style="list-style-type: none"><li>Awarded Yellow Belt in Karate.</li></ul>	2009
Technical Skills	<ul style="list-style-type: none"><li>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</li></ul>	