

Abhijeet Sawant

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Profile

Versatile and goal-oriented MBA graduate with dual specialization in Finance and Marketing, offering a balanced skill set across financial analysis, market research, and strategic marketing. Skilled in evaluating business performance through financial metrics and driving go-to-market strategies through consumer insights and data analytics. Demonstrated understanding of equity markets, portfolio management, investment research, and digital marketing strategies, with hands-on experience in tools like MS Excel, Trading View, PowerPoint, and basic CRM platforms. Adept at identifying growth opportunities through both financial modeling and customer behavior analysis, making informed business decisions backed by numbers and market trends. Open to roles in finance, research, marketing strategy, or client advisory in dynamic and learning-centric environments.

Experience

ASSISTANT MANAGER (HDFC SECURITIES) JUNE 2022 – OCT 2023- 1 YR 5 MOS

Managed retail and HNI clients for equities, derivatives, and mutual fund portfolios

Executed trades and provided advisory on intraday, swing, and long-term strategies using insights from HDFC Securities' official research team (technical & fundamental)

Successfully sold and cross-sold Third Party Products (TPPs) including:

- Mutual Funds, Fixed Deposits, Bonds, Corporate FDs
- Life & Health Insurance
- NPS and Retirement Solutions

Conducted online and offline investor meetings to guide clients on:

- Stock Market Basics & Strategy
- Mutual Fund Investing
- Insurance Planning
- PMS (Portfolio Management Services)
- Asset Allocation & Goal-based Investing

Offered portfolio reviews, risk profiling, and personalized investment planning solutions

Regularly shared market updates, stock insights, and sectoral opportunities

Ensured high client satisfaction through consistent service, relationship management, and education

Built strong expertise in wealth products, compliance norms, and capital markets behavior

BUSINESS DEVELOPMENT MANAGER (VIJAY THAKKAR CONSULTANCY PVT, LTD) APRIL 2020- JUN 2022- 2 YRS 3 MOS

- Handled account opening and onboarding process for Demat & Trading accounts (retail and HNI clients)

Guided clients on a wide range of investment products and financial services, including:

- Mutual Funds
- Life & Health Insurance
- Commodity Trading
- Equity Market Basics

Educated clients on third-party product (TPP) offerings and aligned products with financial goals

Offered insights and suggestions based on official research inputs from partner brokers and research desks

Assisted with KYC compliance, documentation, and backend coordination for seamless account setup
Regularly conducted basic orientation sessions for clients on trading platforms, order types, and investment tools
Helped build strong client relationships through timely follow-ups, product awareness, and service support

Education

MBA FINANCE | YASHODA TECHNICAL CAMPUS, SATARA | SHIVAJI UNIVERSITY KOLHAPUR (A GRADE) 2021 - 2023

BA - SOCIOLOGY | YCMOU NASHIK | 2017 - 2020

HSC | MAHARASHTRA STATE BOARD | FEB 2016

SSC | MAHARASHTRA STATE BOARD | MAR 2014

Skills & Abilities

Skilled in technical & fundamental analysis, equity & derivatives trading, risk management, and capital deployment using Trading View, Excel, and option analytics tools.

Experienced in analyzing price action, macro trends, financial reports, and creating market content for informed decision-making and clear communication

Thanks & Regards