



MITKUMAR MANUBHAI BHOI

Near Swami Narayan temple khambholaj Anand
Gujarat 388330
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OBJECTIVE

To work in an environment which encourages me to succeed and grow professionally where I can utilize my skills and knowledge appropriately.

EXPERIENCE

- **Swami Investment**
08-03-2020 - Present
Financial Advisor/Assistant
Manage investment portfolios for more than 400 clients with over 6 cr in assets under care.
 - Demat account opening
 - Marketing
 - customer relationship Management
 - Guide to client
 - Strategy formation and Execution
 - Strategic Partnership
 - Customer Acquisition and Management
 - Portfolio Optimization

EDUCATION

- **Gujarat technological University**
2020
MBA
Running
- **Sardar Patel University**
2020
BBA(ITM)
7.4 CGPA
- **Gujarat Board**
2017
12 Commerce
78%
- **Gujrat Board**
2015
10 standard
65%

SKILLS

- Sales
- Problem solving
- Team Building
- Trading
- Time Management
- Equity Analysis
- Client education

PROJECTS

- **Comprehensive Project**
Duration- Aug 2019 to March 2020
Technology- Ms word
Team size- 1
Descriptions- I studied Company Financial Statement.
- **Summer Internship Project**
Duration- Aug 2021 to September 2021
Technology- MS word
Team size- 1
Descriptions- I studied the working capital and liquidity position at Solex Energy Ltd.

ACHIEVEMENTS & AWARDS

- Ranker of the school (12 Commerce)
- I Selected as point of sales person
- Successfully managed 1200 Lic client, 100 health insurance client, 400 mutual fund client.
- Successfully Attend more than 60 webinar on Investment and mutual fund
- Attend 5 seminar on Lic of India and 3 seminar on mutual fund

LANGUAGE

- Read- English, Hindi, Gujarati
- Write- English, Hindi, Gujarati

CERTIFICATION

- Certificate of Point of salesperson for Non-life & Health insurance and Life Insurance
- Certification by NJ Insurance brokers Private Limited (2020)
- Certificate of participation in online training workshop from 23th June 2021 to 2 th July 2021 on Employability skills.
- Certificate of successfully passed Hindi Vinit Exam
- Certificate of successfully passed Hindi tishri Exam

INTERESTS

- Trading
- Traveling

REFERENCE

- **Bhounik Shah - "N j Investment Pvt.Ltd"**
Unit Manager
bhaumik.shah@njgroup.in
+91 90999 05282
- **Bhagirath Bohra - "Life insurance corporation"**
Development officer
99246 28323
- **Yogeshbhai patel - "Swami investment"**
Financial Advisor
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