

# Tanesh P. Savaliya



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Career Objective :- To build a career in finance by leveraging my experience in equity and derivatives trading, investment advisory, and client relationship management, while contributing to organizational growth through strong analytical, market research, and portfolio management skills.

#### **Education:**

Post Graduate Diploma in Management (2024-26 Batch) - Pursuing **MKES Institute of Management Studies & Research** 

Specialisation: Finance

AICTE Approved 2-year Full Time programme

**Bachelor of Management Studies - CGPA:** 7.94 CGPA.

Kapol Vidyanidhi College of Management and Technology, Mumbai (May 2023)

**Higher Secondary Education (12th) - Percentage: - 57.85%** 

Jiten Mody Junior College of Arts, Commerce and Science, Mumbai (February 2020)

**Secondary School Education (10th) - Percentage: - 59.00%** 

J.B Khot High School No. 2, Mumbai (May 2020)

## **Skills:**

- Technical Skills: Financial Analysis, Market Research, Technical Analysis, Portfolio Management.
- Soft Skills: Decision-Making, Communication Skills, Networking, Continuous Learning.
- Languages: English, Hindi, Gujarati.

## Work Experience:

Company – Nirmal Bang Securities Job Title: Relationship Manager Intern

## **Key Responsibilities:**

- 1. Acquired and onboarded clients by opening Demat accounts.
- 2. Provided investment guidance and portfolio management advice.
- 3. Built strong client relationships ensuring retention and growth.
- 4. Monitored market trends to deliver informed recommendations.
- 5. Ensured compliance with regulatory and risk policies.
- 6. Cross-sold financial products like Mutual Funds, SIPs, and PMS.

**Self Employed** - 4 years (Present)

**Stock Market** - Inventor Trading Analysis in Equity & Derivatives (Futures & Options)

# **Academic Projects:**

S.H.A.R.E. Socially – Aware Humanitarian Action for a Responsible Enterprise.

SHAISHAV TRUST - BHAVNAGER (GUJARAT)

25<sup>th</sup> November, 2024 To 7<sup>th</sup> December, 2024.

In this project our main mission was to do Data analysis on the child rights audit. The survey was done by the trust and our role was to provide detailed data analysis of the data which includes quotative as well as qualitative data. The data which we have made was presented in their annual Program .i.e. BALSENA.

# **Key responsibilities:**

- 1. To Convert Manual data in excel sheet.
- 2. Analyse the data based on age, gender, location etc.
- 3. Prepared a detailed presentation on the same.

 ${f Outcome}$ : The outcome of this analysis was that they got to know specific problem about the child safety and the main area that they need to focus on . My learning was to that I got a chance to visit villages and interact with the children during the survey

## **Achievements:**

Secured Position in Mktg Comm & PR Committee at College as a HOD

## **Extracurricular Activities:**

## I. Management Premier League (MPL)

Our batch organized an event titled **Management Premier League**, where we were divided into five groups. Each team was tasked with conducting a Corporate Social Responsibility (CSR) activity, performing a skit with a meaningful message, and participating in a management game. The team that excelled across all activities was awarded the trophy.

## II. Job Fair

We organized a **Job Fair** for graduate students who completed their studies in the years 2021, 2022, 2023, and 2024. The event saw participation from over 20 companies, which conducted interviews and recruited students who met the required qualifications. I volunteered for this event, and it was efficiently managed, resulting in a highly successful outcome.