

# Ashish Goel

## Senior Financial Analyst

A proactive & focused professional with capability to establish market presence and increase revenues & profitability in an organization of high repute.



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## WORK EXPERIENCE

### Senior Financial Analyst

Orbis Financial Corporation Limited

01/2020 – Present

Gurugram

#### Achievements/Tasks

- Settlement of foreign remittances of the customers for business purposes, perform deal booking on forex and required compliance management; also provide digital solutions to the clients for better services
- Coordinating with Mutual funds AMC regarding clients Investment and Redemption and placing clients order to AMC.
- Responsible for managing funds for Orbis as well as for Clients.
- Responsible for raising request of BG and LC on behalf of client and coordinating different companies for revocation of POA for the clients.
- Providing services to clients for managing their funds through fund accounting tools.

### Relationship Manager (MM1)

ICICI Bank

Banking

#### Achievements/Tasks

- Managing the portfolio of Elite trade business customers with Deposits and Assets of Rs 55 Cr. from 4 branches.
- Settlement of foreign remittances of the customers for business purposes, perform deal booking on forex and required compliance management; also provide digital solutions to the clients for better services.
- Retained major customers to our bank who got shifted to other bank for trade services. Acquired several companies of over Rs. 100 cr. turnover from other bank by taking over the limit.

### Executive (C04)

CITI CORP SERVICE INDIA PVT LTD

07/2016 – 06/2019

Gurugram

Investment Banker

#### Role

- Responsible for indexing and processing for financial and non financial transactions
- Preparation and processing of wires between TA & Fund accounts, Co-ordinate with internal teams and oversight to handle process related queries via emails and calls
- Ensure quality and timeliness targets are met - Daily and Monthly Participate in team meetings to discuss on process updates, issues, errors etc

## EDUCATION

### MBA

ICFAI Business School

06/2014 – 03/2016

Hyderabad

#### Courses

- Finance

## SKILLS

Financial Modeling

Power point

Ms Office

## INTERNSHIP(INDIABULLS REAL ESTATE LTD)

Financial Statement and Ratio Analysis (02/2015 – 05/2015)

- Analyzed Balance Sheet and Profit & Loss Account; assessed the organization to meet out the current & long-term obligations, drawing comparison with its 05 peer Companies. monthly basis.
- Enhanced the marketing skills and rendered support in preparing MIS on monthly basis

## CERTIFICATIONS

NCAFA Certification of Financial Market (2015)

NISM certification of Mutual Fund Series V (2015)

## LANGUAGES

English



Hindi



## INTERESTS

Playing Cricket

Watching movies

Playing Table Tennis

Reading books

## EDUCATION

### BBA

Birla Institute of Technology Ranchi

06/2011 – 05/2014

Ranchi

Courses

- General Managment

### 12th

DAV Public School

04/2010 – 03/2011

Ghaziabad

Courses

- Commerce with Maths

### 10th

DAV Public School

04/2008 – 03/2009

Ghaziabad

Courses

- General