

JD for PCG Advisor

Reporting: PCG Desk Head

- Understanding the Markets, Technical & Fundamental Stock market reports and advising the same to HNI / UHNI clients mapped to the Desk or to respective Advisor.
- Understanding of Derivative Strategies.
- To improve Market share in Trading and Delivery calls through our advisory calls for the clients mapped to Desk and the respective Advisor.
- Generate direct brokerage revenues by advising various trading and stock ideas based on the market pulse to the clients.
- Regular meetings with Active clients, converting the dormant clients into active.
- Regular Regional visit for HNI client meetings, seminar/events.
- Cross sell of Third party focussed products as suggested by the Anand Rathi group (includes MF, PMS, Structure Products and others).
- The person should be able to acquire HNI / UHNI Clients with reference from existing clients and other market references.
- Maintaining and submission of periodic MIS as per the requirement of the Reporting Head.
- Revenue generation and increasing the revenue share within the ambit of the internal & external approved policies of RMS and Compliance regularities.
- Candidate should have minimum experience of around 5 years from banking and broking industries and managing bank AUM of HNI Clients.