

JD for HNI Dealer

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