

Title	Third Party Products & Advisory
Education	Graduate + CFA or Post Graduate MBA - Finance or CA
Role & responsibilities	<ol style="list-style-type: none"> 1. Assist Product Team in Asset Manager shortlisting, selection, evaluation and ongoing appraisal cum review of approved managers. 2. Preparing the fund manager interaction notes and minutes for reference of the sales teams 3. Aid the sales team (RM's) for Portfolio Analytics (MF, Direct Equity, PMS data/SIP returns/factsheets) and other product reports required for prospect and existing clients. 4. Prepare monthly product based updates - MF reckoner, Performance update on MFs, PMS & AIF, Product presentations etc. 5. Keeping abreast of the new ideas & products bought up in MF/Alternates industry and track of what new investment ideas competitive firms are coming out with 4. Portfolio consolidation for portfolio reviews & portfolio specific analytics 6. Prepare reports and insight documents periodically 7. Special Projects to enhance and automate using technology and also evaluate external vendors.
Location	Kalina - Mumbai (WFO)
Requisites	<ol style="list-style-type: none"> 1. Good understanding of Equity and Debt markets and their functioning. 2. Sound knowledge of analytical calculations using MS Office, 3. Proficiency in ACE MF , Bloomberg , ACE Equity, Capital IQ or similar software/tools etc. 4. Updated knowledge of current market trends & macroeconomics
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