

Job Title: Junior Relationship Manager – Investments

Company Website: www.firstglobalsec.com

Location: Vashi, Navi Mumbai

Work Experience - Minimum 1 year in investment sales / financial services

CTC Range – As per industry standards + discretionary incentives based on performance.

Qualification: BBA/MBA in Finance or related field

Reporting to: Director

Company Profile:

First Global is a prominent asset management firm, managing both global and Indian (Fund Management Services) assets.

First Global has been known for its innovative and forward-thinking approach. Here are some key points about First Global:

1. Background:

- Founded in 1995, First Global has a rich history in the Investment, Research, and Advice business.
- The company has been operating in Global Markets for over 25 years.
- First Global expertise lies in managing Global and Indian Assets, assisting large institutional clients/ Family Offices and UHNIs in managing their portfolios and assets

2. Expanding Services:

- From being a securities firm focusing on research Stock broking and investment banking, First Global started global asset management in 2015
- In 2020, it additionally launched its own Investment Products, such as Portfolio Management Services (PMS), Alternative Investment Funds (AIF), and Global products in India.

3. Thought Leadership:

- First Global is recognized as a thought leader and trailblazer.
- First Global's well-analyzed perspectives on macroeconomics and financial markets set them apart.

4. Company Culture:

- First Global maintains a culture oriented towards excellence, learning, credibility and constant improvement.
- Employees are encouraged to work hard, work smart, and enjoy the journey.

5. Memberships and Licences:

- First Global is regulated by Financial Conduct Authority (FCA) in UK and Securities and Exchange Commission (SEC) in the US.
- First Global is a composite member of Bombay Stock Exchange Ltd. (BSE) and National Stock Exchange of India Ltd. (NSE) and regulated by Securities and Exchange Board of India (SEBI) in India.
- First Global is also registered with SEBI as Category I Merchant Banker, Portfolio Manager and Research Entity.

For further details kindly go through the company's website:- www.firstglobalsec.com

So, are you ready for the exciting ride with First Global?

Job Description:

What you will be doing?

Should have worked OR supervised on the following processes:

1. Relationship handling - Building and managing client relationships.
2. Client servicing - Servicing existing clients and responding to their queries.
3. Upselling and cross-selling suitable investment products (PMS, AIF, Global offerings, etc.).
4. Maintaining client satisfaction through proactive communication and support.
5. Calling and following up with old and new leads to pitch relevant investment products and convert prospects into clients.
6. Be available to connect and follow up with clients as per their availability.
7. Work with a strong sales mindset, always focused on achieving targets and driving business growth.

Key Skills:

1. Strong client engagement and interpersonal skills.
2. Basic understanding of financial markets and investment products.
3. Excellent written and verbal communication.
4. Attention to detail and a solution-oriented mindset.
5. Ability to work independently and collaboratively in a fast-paced environment.
6. Willingness to be flexible with timing to suit client availability