

Job Title: Sales Executive – Lead Generation and Client Servicing

Company Website: www.firstglobalsec.com

Location: Vashi, Navi Mumbai

Work Experience - Freshers

CTC Range – As per industry standards

Qualification: BBA Graduates

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. Outgoing calls - Identify, generate, and qualify new leads through calls, emails, and follow-ups
2. Proactively reach out to old and existing leads to pitch suitable investment products
3. Collaborate with the relationship team to ensure a smooth client experience
4. Upsell and cross-sell products such as PMS, AIFs, and Global offerings where relevant.
5. Be available to connect with clients according to their preferred timings
6. Maintain detailed records of interactions, follow-ups, and lead status using CRM.

Key Skills:

1. Strong communication and interpersonal skills
2. Passion for sales and client engagement
3. Basic understanding of capital markets and investment products
4. Ability to manage time effectively and follow up diligently
5. Self-driven with a numbers-oriented mindset
6. Flexibility to align with client availability