

CURRICULUM VITAE

KEY EXPERTISE

MANAGERIAL

- ✓ Strategic Planner with a Vision of development by creative Thinking, Positive approach
- ✓ Highly competent to meet Senior Management's Expectations by redressing teams for their Professional nurtures and by engaging via Emotional Intelligence
- ✓ Professional in application of daily objectives & materializing daily assignments preferably via Non-Verbal Communications
- ✓ Expert in Management Info. System (MIS), Sales Audit Process and Working Modules
- ✓ Ingenious in Multitasking & Adaptable to work under pressure and meeting deadlines
- ✓ Excellent Analytical Skills creating synergy among teams
- ✓ Efficient to introduce and showcase potential teammates for their expertise to approach opportunities
- ✓ Adaptable in Giving and Receiving feedback during periodical review of evolution of self and team

TRADE-FOREX & CMS


- ✓ Trade Finance, Forex & Transaction Banking Solutions
- ✓ Cash Management Services (CMS) and Working Capital Products
- ✓ Affluent & Commercial Banking Relationship Management
- ✓ Revenue Growth, NTB Acquisition & Portfolio Expansion
- ✓ Digital Banking Platforms – Trade Online, FX Online, I-Biz & CMS
- ✓ Cross-Selling of Wealth, Investment & Insurance Products
- ✓ Team Leadership, Training & Regional Business Development
- ✓ Strategic Client Engagement & Treasury Sales Execution
- ✓ Trade Compliance, AML / KYC & Regulatory Adherence
- ✓ Analytical Decision-Making & Performance Optimization

LANGUAGE PROFICIENCY

Fluent in English, Hindi
Understand Rajasthani and Gujarati languages

NAVNEET GUPTA

Vice President | Wholesale Banking & Trade Finance Expert
LinkedIn Influencer in Trade Finance (6.5k+ Followers)

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FATHER: Late Naveen Kumar (EX-Chief Controller in Indian Railways Jodhpur)

MOTHER: Mrs. Renu Gupta (Retd. Chief Office Superintendent Indian Railways, Jodhpur)
(A Lady with Great Ethics & High Moral)

PROFESSIONAL OVERVIEW

A Strategic leader with a progressive career of 18+ years, providing a vision and direction needed to achieve accelerated and sustained growth whilst decreasing costs. Strong exposure of Customer Service and team management with different organization cultures. Demonstrated versatility of quickly transition in across different Geographical market sectors of Rajasthan and Gujarat.

SOCIAL MEDIA INTRO

I'm a prominent  **Influencer**, followed by 6.5k+ followers while curating and sharing informative posts centered around Trade-Finance and Banking awareness. All my content offers valuable insights with knowledge in dynamic realms of Trade-Finance and Banking. It shines my expertise & making me go-to source for individuals navigating the intricacies of these sectors. I always believe in "Happy to Help" philosophy.

CAREER JOURNEY



PRESENT EMPLOYMENT



Based out at Jodhpur handling West, North & South Rajasthan

Sr. Product Sales Manager | Vice President | Cash & Trade Forex (Wholesale Banking)

Sep. 25 to till present

Present Assignment:

- **Promoted to Vice President for exemplary contribution, consistent Performance and Initiatives**
- Managing Cash Trade & Forex (CTFX) portfolio for Commercial Banking clients across Rajasthan with added responsibility of Cash Management Services (CMS).
- Driving Commercial Banking solutions with focus on acquisition, revenue growth and client servicing.
- Partnering with Relationship and Product teams to enhance client experience and strengthen transaction flows.

Sr. Product Sales Manager | Transaction Banking Group (TBG) | Apr 2025 – Aug 2025

Profile Synopsis:

- Oversaw Trade Finance & FX portfolio under Transaction Banking Group catering to mid-corporate and commercial clients.
- Led regional initiatives to strengthen client engagement, drive digital adoption, and cross-sell transaction banking solutions.

Product Sales Manager | Business Banking Trade Forex (BBTFx) | Feb. 2023 – Mar. 2025

Profile Synopsis:

- Managed Trade & Forex business across West & North Rajasthan in coordination with Business Banking & Working Capital teams.
- Onboarded NTB clients with record disbursements in EPC, PCFC, GML and Loan Against Import.

COMPUTER SKILLS

Well versed with MS applications, conversant in **Mail Writing & Management**, able in working with across OS and Internet

OPERATIONAL:

Expert in customer service with organizational policies & standard

Audit, Compliance, Risk Analysis and Statistics for adoption & adherence

Devising policies/procedures for Development and reducing overall costs to the bank

SUCCESS MANTRA

"Go Punctual, Be Helpful, Think Creative & Do Accurate"

INTERESTS

Advance-Excel, Power-BI & Creative PPTs, Learning & Trainings, Sharing knowledge and Developments on Trade Finance, Banking, Regulatory etc. Gaining curiosity on latest Tech & Automobiles.

EDUCATION

Master of Commerce (Business Finance & Economics), a two-year full time Master's degree program, emphasized on International Marketing, Financial Management and Export Import Documents, from JNVU Jodhpur, Rajasthan – 2006

Bachelor of Commerce, a three-year full time degree course covering all the aspects of Commerce, Banking & Economics studies in detail, from JNVU Jodhpur, Rajasthan – 2004

PERSONAL DETAILS

Gender : Male
Date of Birth : 25/05/1984
Current Location : Jodhpur, Raj.
Location Choice : Open to Discuss

Initiatives & Core Developments (YES Bank Ltd):

- Onboarded first customer (self-sourced) with 1.9 Cr. AOC for Rubal-INR transactions with a whopping revenue of 1.25 Cr.+ FX Revenue till now
- First Bullion Customer of Zone (Rajasthan, Gujarat & MP) onboarded with PSR limit of 300 Cr. and initiated transaction of 5 Ton Silver Bars with high revenue.
- Developed Fund Based book with biggest ever disbursement (Rajasthan) of EPC limit with 35 Cr.
- First Customer onboarded with Loan Against Import (Rajasthan)
- Explored WCDL FCY product opportunity in mapped market and developed series of customers
- Disbursed Yes Strike limits (10+ limits in a row) first time since it was launched in entire Zone

PAST JOB EXPERIENCES



ICICI Bank Based out at Jodhpur handling West & North Rajasthan

Regional Head – Sales | Chief Manager–I (Affluent Banking – TFX & Wealth) | Apr 22 – Feb 23

Profile Synopsis:

- Led Affluent Banking across 140+ branches in West & North Rajasthan, managing 3,500+ client base.
- Guided a team of 14 members and expanded scope in Trade & Forex & Wealth Management.
- Drove adoption of digital platforms like Trade Online, FX-Online, I-Biz, and CMS for affluent clients.

Regional Head – Sales | Manager – II (ETRG – Trade & Forex) | Sep. 2019 – Mar. 2022

Profile Synopsis:

- Managed Trade & Forex business focusing on portfolio profitability and NTB acquisitions.
- Trained branch and trade teams on compliance, digital tools, and FX risk management.
- Consistently exceeded regional trade revenue targets through structured product engagement.



YES BANK Based out at Ahmedabad, Gujarat

Cluster Sales Leader – Business | Assistant Vice President (Trade CA) | Nov. 2018 – Sep. 2019

Profile Synopsis:

- Recruited and developed Business Relationship Partners (8 BRPs) for EXIM client acquisition.
- Spearheaded a lead generation campaign targeting IT sector clients, resulting in increased cross-border transaction volume.
- Responsible for TCP (EXIM On-boarding) of customer with coordination of Trade Manager



ICICI Bank Based out at Jodhpur, Rajasthan

Branch Manager | Manager-I | July 2015 – Nov. 2018

Profile Synopsis:

- Managed branch operations, CASA growth, and P&L performance with Branch Teams.
- Ensured compliance adherence, customer engagement, and digital channel activation.



IndusInd Bank Based out at Jodhpur, Rajasthan

Emerging Corporate Relationship Manager | Manager Grade | Oct. 2012 – July 2015

Profile Synopsis:

- Managed TFX portfolio for corporates, coordinating with Trade Operations for daily transactions.
- Developed strong relationships across channels ensuring high service levels and portfolio growth.

PROJECTS UNDERTAKEN

- Working as a core member (PAN India 20 members) of Trade Transformation Project in which we are evolving Digital Platform of **Trade On Net 2.0** with best industry practices – Yes Bank
- Task assigned to train new PSMs - BBTFx PAN India with product and processes – Yes Bank