Launch Your Career with SBI Funds Management Ltd

At SBIFML, we offer more than just jobs—we provide the foundation for a fulfilling career where you can innovate, grow, and make an impact. We're looking for enthusiastic, passionate students who are eager to bring fresh ideas, challenge themselves, and drive real results. Join our dynamic, inclusive team and gain access to unparalleled learning, development, and leadership opportunities. If you're ready to shape the future with an industry leader, this is your chance to build a bright future with us!

Relationship Manager – Institutional Business

Job Description

Role and Responsibilities

- Engage in Institutional sales or Key Accounts Management.
- Responsible for directly handling Family Offices / HNI / SME clients / Corporates.
- Drive business growth in Institutional Investor Space for the Company.
- Execute B2B sales, Corporate / Institutional Sales
- Acquire new clients across relevant Corporate Investor Categories (Large, Medium and SME).
- Sale of SBIMF products at the allocated location and areas in and around the identified location, additionally build relationships for generating sales.
- Liaison with Corporates / distributors / banks / institutions / SMEs
- Build and maintain healthy business relations with Institutional Investors
- Penetrate all targeted key accounts and originate upselling opportunities
- Ensure adherence to sales processes and requirements.
- Achievement of monthly, quarterly & yearly business plan.
- Channel Development & networking skills for achieving Channel Sales

Skills & Competencies

- Aptitude for economic and financial concepts.
- Good knowledge of relevant sectors & financial ecosystems consisting of but not limited to equity, debt market, & other global sectors.
- Proactive and goal oriented
- Understanding of Treasury and Fixed Income products
- Able to work independently and as a team player
- Excellent verbal communication skills and active listening skills
- Account Management skills
- Excellent Presentation Skills
- Positive and enthusiastic attitude
- Customer focused and result oriented approach

Qualification & Experience

- MBA/Graduating in the year 2025
- NISM V-A Certified

Relationship Manager - Affluent Client

Job Description

Role and Responsibilities

- Client Acquisition and Relationship Management
  - Identify, prospect, and acquire new high-net-worth clients (HNWIs).
  - Build, nurture, and sustain long-term relationships with existing clients.
  - Understand clients' financial goals, risk tolerance, and investment need to provide tailored financial planning solutions.
- Product Knowledge and Sales
  - Attain deep expertise in mutual funds and alternative investment products.
  - Present and explain product features, benefits, and associated risks to clients effectively.
  - Drive cross-selling and upselling initiatives to achieve sales and revenue targets for the assigned region.
- Market Intelligence and Competitive Analysis
  - Monitor industry trends, regulatory updates, and competitors' strategies.
  - Formulate innovative sales strategies to enhance market presence.
- Compliance and Risk Management
  - Ensure adherence to regulatory guidelines and internal compliance standards.
  - Proactively manage risks to safeguard clients' and the company's interests.
  - Maintain precise and up-to-date documentation of client interactions and transactions.

Skills & Competencies

- Strong knowledge of Indian capital markets and financial instruments
- Excellent communication, presentation, and relationship-building skills.
- Proven sales and negotiation expertise with a results-driven approach
- Ability to work independently and collaboratively in a fast-paced environment

Qualification & Experience

- MBA/ Graduating in the year 2025
- Certifications: NISM V-A & XXI-A
- Experience: 5–10 years in financial services, preferably in wealth management or sales of investment products

Jr. Dealer

Job Description

Role and Responsibilities

Trade Execution & Management:

- Execute buy and sell orders for fixed income securities, including money market securities, government bonds, corporate debt and other structured products.
- Analyze market conditions, provide market feedback in a structured and timely manner and execute trades based on fund manager requisitions, focusing on best execution.
- Ensure timely and accurate trade settlements on internal and external platforms and monitor trades for compliance with risk management and regulatory compliance protocols.
- Monitor and manage the firm's broker transactions and broker empanelment process and ensure best execution and compliance with internal guidelines.

Market Analysis & Strategy Development:

- Monitor fixed income markets and economic indicators to identify market trends and support portfolio decisions.
- Collaborate with research teams and portfolio managers to form market views and trading strategies, ensuring they align with the firm's risk and return objectives.
- Provide market insights and analysis to portfolio managers and senior management regarding fixed income markets and related macroeconomic developments.
- Maintain market related databases in a structured manner daily to support decision making.
- Maintain and enhance relationships with market participants including intermediaries to ensure timely and seamless flow of market information and market trends to the investment team.
- Monitor industry trends and exposures to support portfolio decisions.

Risk & Compliance Management:

- Adhere to regulatory and compliance requirements in trading activities, ensuring full documentation and reporting of all trades.
- Responsible for best execution and fair allocation of trades based on internal and regulatory norms as applicable.
- Strong Understanding of and strict compliance with regulatory code of conduct and financial market practices and other compliance protocols.
- Monitor margining and other requirements with respect to all trading and settlement platforms and coordinate with portfolio managers and Backoffice.

Reporting & Documentation:

- Prepare daily, weekly, and monthly reports on trading activity and market trends.
- Proactive market trend analysis and written reports and engagement with the wider team.
- Maintain accurate records of trade execution and positions for audit and compliance purposes.

Skills & Competencies

- Strong quantitative skills
- Analytical aptitude and ability to learn financial concepts
- Strong Microsoft Office skills
- Good communication skills
- Strong motivation to learn and manage projects independently
- Ability to interpret financial models and market data.
- Familiarity with trading platforms and market data tools (e.g., Bloomberg, Reuters, etc.)

Qualification & Experience

- MBA/PGDM/1-3 years of experience
- CFA Certification preferred

Credit Research Analyst

Job Description

Role and Responsibilities

- Carry out detailed Credit Risk Analysis based on Analysis of financial statements, company and industry research & peer comparison.
- Adept at giving views on the creditworthiness of the existing issuers. (Corporates, Banks & Financial Institutions & NBFCs)
- Monitoring credit quality and limits of existing Issuers & structured debt papers.
- Provide meaningful inputs to the Fund management team & presenting Regular and insightful presentations for credit review and appraisal of new proposals.
- Managing documentation, carrying out data mining and analysis, communicating with issuers and rating agencies.

Skills & Competencies

- Quick thinking and problem-solving skills.
- Able to work independently and as a team player.
- Ability to Interact with issuers and rating agencies diligently.
- Excellent communication skills and active listening skills.
- Subject matter expertise in fixed income credit analysis and excellent financial modelling skills.
- Analytical skills and process compliance.

Qualification & Experience

- CA/MBA from a Tier I institute with 1 - 4 Years of relevant work experience with a Mutual Fund, Credit Rating Agency or Corporate banking.
- CFA is an added advantage.
- Good knowledge of Debt Markets will be an added advantage.