

Operations Executive – Job Description

Upside AI is a tech-based investment management company. Upside AI was founded on the idea that technology will make better decisions over humans in the long run and is therefore building India's leading tech-first asset management platform.

In the two years since Upside AI has been live, we have delivered best in class returns for investors and grown our AUM to Rs 600 mn organically. We have raised a round of funding from marquee investors like Endiya Partners, Vijay Kedia (veteran public markets investor), Ajay Nanavati (ex-Chairman, Syndicate Bank) and Gopichand Katragadda (ex-CTO of Tata Group).

We are looking to expand the team and hire an Operations Executive. If you are interested in the role, write to us at careers@upsideai.com

Job description

- Client onboarding documentation and KYC
- Compliance related activities – assistance with regular filings with SEBI, coordinating with custodian and fund accountant for receiving and vetting this data
- Trade reconciliation and uploading of daily trades to custodian and in internal software
- Back-office assistance with accounts and billing

The Successful Applicant

- Has spent 1-3 years in wealth management/advisory/PMS and understands the basics of PMS workflow
- Educational qualification: B.Com (minimum) + CA/MBA (preferable)
- Financial literacy, proficient in Microsoft Excel/Word, good communication skills (English and Hindi)
- Self-starter with attention-to-detail and ability to adapt in a dynamic work environment
- Passionate and enthusiastic to build a tech led AMC from the ground floor

Compensation

- Outstanding package and incentives