



# RAJA MUKHERJEE

## Alternate Investment Portfolio Manager

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**LinkedIn:** <https://www.linkedin.com/in/Rajamukherjee1973> | **Date of Birth:** 09/04/1973 | **Nationality:** India

### PROFESSIONAL SUMMARY

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- Senior Wealth Manager having detailed expertise with Portfolio Management Services, Family Office, Offshore Banking & Alternate Investment.
- Have 29 years experience with ideation designing and implementing financial product suite for businesses for Domestic & International Brands.
- Managed AUM of INR 14.75 Billion for Institutional & HNI Families.
- I am AMFI Certified bearing ARN:304218 & IRDA Reg. Number: URN IRD NO: BSLI1305240111 & Registration No; I-051104L0593225.
- I have managed Large Institutional Clients, Corporations, and Ultra Rich Family wealth in various roles: as a Wealth Manager, Private Banker, Institutional Portfolio advisor, and Product Manager.
- Navigating the Fintech landscape, I am well-positioned to deliver high-net-worth clients with robust wealth management solutions at AssetPlus.
- My competencies in financial product services & keen analysis of Onshore & Offshore investment opportunities define the essence of my role.
- My strategic insights in identifying profitable investment themes and facilitating collaborations creates value for my organization.
- My hands-on experience in advising on asset management strategies has been instrumental in fostering growth and maximizing returns for our esteemed clientele.

### EXPERIENCE

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AssetPlus a Fintech Platform of Valueplus Technologies Pvt Ltd | Chennai, Tamil Nadu

#### **Wealth Specialist | Partner**

08/2024 - Present

- I am an AssetPlus Partner, a registered Fintech Brand of Valueplus Technologies Private Limited, an AMFI-registered Advisor & Fintech Platform of Mutual funds (ARN-114376) having IRDA CA Regn. No: CA0857.
- I am Senior Level Private Wealth Specialist offering a wide range of Financial products and services to my High Networth Clients including Mutual Funds, Portfolio Management Services, Life and Health Care Insurance.
- I offer my clients both Onshore and Offshore investment opportunities.
- I am working across sectors to identify stocks and develop investment themes and ideas for my clients. I explore profitable companies that are in the mode of expansion and growth, get the audit & valuation is done through a SEBI-registered equity valuer, and based on the valuation facilitate investments through B2C, B2B, and B2B2C channels.
- Post Fundraising, I facilitate exit for our investors through Placement / Buy-Out of portfolio / IPO; specialize in SME IPO, and provide structured advisory on how to go for public listing.
- I have a portfolio of Listed Equity, Debt, and Unlisted Equity comprising some of the leading names from India's start-up ecosystem.

<p>Suraj Infratech   Institutional Business Group (IBG)   Kolkata, West Bengal  <b>Senior Managing Partner   Energy &amp; Smart Infra</b>  01/2024 - 07/2024</p>	<ul style="list-style-type: none"> <li>• Looking to partner with Entrepreneurs to create future relevant businesses.</li> </ul>
<p>Suraj Infratech   Institutional Business Group (IBG)   Kolkata, West Bengal  <b>Senior Consulting Partner   Energy &amp; Smart Infra</b>  02/2014 - 01/2024</p>	<ul style="list-style-type: none"> <li>• Managed strategic initiatives for seamless integration of smart infrastructure in the energy sector.</li> <li>• Negotiated high-value deals and facilitated due diligence processes for strategic partnerships.</li> <li>• Advised on asset management strategies to maximize returns and improve ABS portfolio.</li> </ul>
<p>Suraj Infratech   Institutional Business Group (IBG)   Kolkata, West Bengal  <b>Senior Consulting Partner   Energy &amp; Smart Infra</b>  02/2014 - 01/2024</p>	<ul style="list-style-type: none"> <li>• Analyzed and implemented cost &amp; performance improvements for Solar projects, enhancing operational efficiency and project outcomes.</li> <li>• Led feasibility studies, scenario analyses, and tariff bidding for solar projects, securing funding for proprietary projects.</li> <li>• Developed commercial and industrial businesses for renewable energy IPPs, driving strategic growth &amp; sustainability.</li> </ul>
<p>Juran Green Energy Partners World Wide (JGEPWW)   B2B &amp; Institutional Business   Kolkata, West Bengal  <b>Managing Partner   Renewables and Bio Gas</b>  08/2011 - 01/2014</p>	<ul style="list-style-type: none"> <li>• Evaluated Solar bid opportunities and analyzed market and competition, leveraging the company to the top 10 in the Eastern Region.</li> <li>• Enhanced client portfolio by acquiring private industrial and commercial consumers for solar power sales.</li> <li>• Secured optimal financial solutions by negotiating with banks and financial institutions for solar project financing.</li> <li>• Revamped sales strategies, resulting in a 45% revenue increase within the first 18 months.</li> </ul>
<p>Knesopic Electronics Private Limited   Kolkata, West Bengal  <b>General Manager &amp; Project Head   EPC &amp; IPP</b>  06/2009 - 08/2011</p>	<ul style="list-style-type: none"> <li>• Structured the Alternate Energy product development vertical, securing a Joint Venture with the Vietnam Farmers' Union for home lighting solutions in Vietnam.</li> <li>• Analyzed the solar power sector in India, identifying growth opportunities and participating in government-based schemes which led to 200% growth for the company in 18 months.</li> <li>• Launched five new market-leading products, capturing significant market share and enhancing brand reputation.</li> </ul>
<p>IndusInd Bank Ltd   A Hinduja Group Venture in India   Kolkata, West Bengal  <b>Regional Relationship Manager   FIPS Corporate</b>  11/2007 - 06/2009</p>	<ul style="list-style-type: none"> <li>• Championed portfolio growth, achieving a 35% Y-O-Y increase in Ultra High Net Worth Individuals and institutional clients' investments.</li> <li>• Increased wallet share by analyzing and optimizing account management for SMEs, Corporate, and Financial Institutions.</li> <li>• Achieved 147% Year-on-year growth in the North Eastern Region with a substantial ENR achievement of 1201% for Q4 by FY ending March 2009.</li> </ul>
<p>ABN AMRO Bank N.V   Van Gogh Preferred Banking   Kolkata, West Bengal  <b>Relationship Private Banker</b>  01/2004 - 10/2007</p>	<ul style="list-style-type: none"> <li>• Pioneered over a dozen high-value relationships for the 'Van Gogh Preferred Banking team, establishing a profitable and thriving portfolio.</li> <li>• Championed financial planning for more than 200 customers, utilizing both telesales and field sales models through certified financial planners.</li> <li>• Acquired premium retail accounts from the market, each with a Net Relationship Value (NRV) of INR 1.5 Million to 5.0 Million for Private Wealth Clients and Portfolio Management Services (PMS).</li> <li>• Managed an Asset Under Management (AUM) portfolio worth INR 135 Million, achieving an average portfolio growth rate of 18% pa. Acquired 25 Ultra High Net Worth (UHNW) clients, significantly</li> </ul>

boosting the business's client base.

- Ensured compliance with global and market standards of client service, regulatory norms, and operating models, aligning with industry best practices.

Max New York Life Insurance Co.Ltd |  
Annuity & Life Insurance | Kolkata, West  
Bengal

**Estate Planning Professional & Career  
Agent**

02/2002 - 01/2004

- Advised over 1000 clients on Whole Life Insurance Plans, Limited Payment Endowment Plans, and Pension products, enhancing their financial and Estate Planning strategies.
- Boosted the New to Agency portfolio with 125 clients, cross-leveraging revenues for the organization with an average ticket size of Indian Rupees 50,000.

Life Insurance Corporation Of India |  
Pension & | Kolkata, West Bengal

**Estate Planning Professional & Career  
Agent**

01/1995 - 01/2002

- Acquired 1300 new policyholders, expanding market reach and client base.
- Developed a strong portfolio of 475 Superannuation product holders for long-term client relationships.
- Managed client portfolios including Money Back, Endowment, Whole Life, Keyman, and Pension products,tailored to individual financial goals and planning.

## EDUCATION

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**Post Graduate Diploma in Air & Space Law (PGDASL)** in Aerospace and International Law, Aviation Financing  
Mechanism Candidate

National University of Juridical Sciences (NUJS) | Kolkata,West Bengal,India

*Expected graduation December 2025*

**Certificate Program in Introduction to The World Bank Environmental and Social Framework (ESF)** in  
Environmental and Social Framework (ESF)

World Bank Group (WBG) | Washington D.C,United States of America

*July 2024*

**Post Graduate Diploma in Entrepreneurship Administration and Business Laws** in Entrepreneurship and  
Business Law

National University of Juridical Sciences (NUJS) | Kolkata,West Bengal,India

*April 2016*

**Certification Program in Municipal Finances** in Municipal Finances

World Bank Group (WBG ) | Washington D.C, United States of America

*May 2014*

## SKILLS

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- Stakeholder Engagement
- Energy Efficiency Strategies
- Estate Planning
- Financial Modeling
- Asset Allocation
- Product Development
- Team leadership
- Alternative Investments
- Contract Negotiation
- Private Banker
- Market Analysis & Research
- MS Excel
- Risk Mitigation
- Cross-functional collaboration
- Portfolio Management Services
- Discretionary Advisory

## HOBBIES AND INTERESTS

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- Photography

- Adventure Sports
- Trekking

## REFERENCES

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References available upon request

## CERTIFICATIONS

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- Corporate Finance: Environmental, Social, and Governance (ESG) certified by PMI Houston (Project Management Institute - Houston Chapter)
- Corporate Finance: Financial Modeling and Forecasting Financial Statements certified by National Association of State Boards of Accountancy (NASBA)
- NISM-Series-V-A: Mutual Fund Distributors Certification Examination as required under the SEBI (Certification of Associated Persons in the Securities Markets) Regulations, 2007 certified by National Institute of Securities Markets (NISM), India
- Finance Foundations: Business Valuation certified by Project Management Institute, Washington DC Chapter, Inc
- The Data Science Playbook for Private Equity and Venture Capital certified by LinkedIn
- IC38 -Certificate Exam of Insurance Agents in Life Insurance certified by Insurance Regulatory and Development Authority of India (IRDA)