

MARILDA LOBO

S E N I O R A S S O C I A T E

lobomarilda@gmail.com +919987374764 Mumbai

OVERVIEW

Results-driven banking and financial services professional, adept at collaborating with business partners to deliver seamless solutions that enhance client satisfaction. Strong communicator with exceptional stakeholder engagement skills, capable of building and maintaining relationships at all levels.

SKILLS

- Operational Efficiency
- Risk Management
- Effective Communication
- Critical Thinking
- Stakeholder Engagement
- Quality Assurance
- Problem Solving

EDUCATION

KAPLAN BUSINESS SCHOOL-MELBOURNE

Master of Business Analytics

High Achievers Scholarship
Jul 2021 - Jun 2023

THE UNIVERSITY OF MELBOURNE

Master of Management (Accounting & Finance)

Feb 2017 - Dec 2018

UNIVERSITY OF MUMBAI

Mithibai College of Commerce

Bachelor of Commerce (Accounting)

Jun 2013 - Mar 2016

REFERENCES

Will be made available upon request.

EXPERIENCE

SENIOR ASSOCIATE - WEALTH OPERATIONS

Macquarie Group (Banking & Financial Services)

Nov 2019 - Jun 2024

- Subject Matter Expert for platform trade execution and settlement.
- Assist with daily operations of wealth management, including asset transfers, reviewing client documentation, generating reports, and resolving trade related issues.
- Independently oversee and review (ASX) manual trade processing and managed fund order cancellations for the wrap platform.
- Liaise with Direct Trading Representatives and trade surveillance teams to manage and escalate automated trade execution errors and orders raising market integrity concerns in client portfolios.
- Ensure trading compliance with both internal and external requirements, proactively adjusting processes as needed to address regulatory timescales for trades and corporate actions.
- Coordinate with cross-functional teams to identify trade breaches, address trade incidents and implement corrective actions.
- Build and maintain process guides, manuals and resources on trading functions across the platform to aid knowledge management and staff training.
- Contribute to the development and implementation of robust procedures and controls aimed at mitigating risks and maintaining operational efficiency.
- Collaborate effectively with cross functional teams on projects and initiatives to ensure alignment and integration of processes, facilitating seamless client experience and contributing to overall strategic objectives.
- Collate data and prepare presentations on trading functions and volumes, effectively communicating insights and findings to senior stakeholders.
- Summarise trade execution details and documents from multiple sources for auditing purposes.