

Kartavya Bhushan

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PROFESSIONAL SUMMARY

Finance professional with an MBA in Finance from IIT Patna and a BCA background, combining strong capital-market knowledge with 3.5+ years of experience across fintech operations, algorithmic trading, customer support, and client engagement.

Currently working with AlgoTest, providing end-to-end technical and strategic support to retail and institutional algorithmic traders. Experienced in troubleshooting complex trading workflows, strategy execution, API connectivity, broker integrations, and platform-related issues while coordinating closely with Product and Engineering teams.

Hands-on experience with algorithmic strategies based on **Simple Momentum, Opening Range Breakout (ORB), and EMA**, along with pre-defined options strategies such as **Iron Condor, Butterfly, Bull Call Spread, and other multi-leg option structures**. Strong ability to understand complex trading concepts, investigate user issues, simplify technical and financial concepts, and take complete ownership of problems through resolution.

Curious, analytical, empathetic, and comfortable working in fast-paced environments where customer support requires deep product and market knowledge rather than routine ticket handling.

CORE COMPETENCIES

Customer Support & Ownership

End-to-End Issue Resolution · Customer Escalation Management · Technical Troubleshooting · Client Communication · User Issue Investigation · Cross-Team Coordination · Customer Experience

Capital Markets & Trading

Equity Markets · Futures & Options · Options Strategies · Market Microstructure · Order Types · Order Execution · Risk Management · Mutual Funds

Algorithmic Trading

Simple Momentum · Opening Range Breakout (ORB) · EMA-Based Strategies · Iron Condor · Butterfly · Bull Call Spread · Multi-Leg Options Strategies · Strategy Execution

Product & Technical

Trading Platforms · Broker APIs · API Troubleshooting · Bug Identification & Reporting · Product Feedback · User Workflow Analysis · MS Excel · Generative AI

Research & Communication

Financial Research · Investor Education · Complex Concept Simplification · Corporate Presentations · Documentation · Stakeholder Management

PROFESSIONAL EXPERIENCE

ALGOTEST (ORAPH PVT. LTD.) — Delhi, India

Consultant / Support Associate | December 2025 – Present

- Own end-to-end support for retail and institutional algorithmic traders, from initial user contact and issue identification through investigation, resolution, and cross-team coordination.
- Troubleshoot complex trading-platform issues involving strategy execution, execution slips, API connectivity, broker integrations, and programmatic trading workflows.
- Work extensively with algorithmic strategies based on **Simple Momentum, Opening Range Breakout (ORB), and EMA**, along with pre-defined options strategies such as **Iron Condor, Butterfly, Bull Call Spread, and other multi-leg option structures**.
- Investigate customer-reported issues to identify underlying technical, strategy, execution, or workflow-related causes rather than relying solely on routine troubleshooting.
- Explain complex trading strategies, platform functionality, execution behaviour, and technical issues to customers in a clear and easy-to-understand manner.
- Collaborate directly with Product and Engineering teams to report bugs, communicate user pain points, and translate recurring issues into platform improvements.
- Analyze trade ledgers, execution behaviour, strategy configurations, and account workflows to resolve issues and maintain platform reliability for high-value users.
- Develop and maintain in-depth product knowledge across algorithmic trading systems, derivatives, broker APIs, order execution, and platform functionality.
- Handle sensitive and time-critical trading issues while maintaining accuracy, empathy, responsiveness, and complete ownership.

INVSTO — Remote

Founder's Office Intern & Content Writer | April 2025 – November 2025

- Conducted deep-dive fundamental and market research on macro trends and evolving wealth-management products to support business strategies and proposals.
- Designed investor education frameworks and interactive content to simplify complex derivative structures and financial concepts.

- Created presentations and institutional-grade market commentary, generating **50,000+ organic impressions**.
- Developed digital content strategies focused on educating retail investors about financial markets and investment concepts.
- Pioneered AI-assisted research workflows using ChatGPT and Claude, improving weekly reporting efficiency by **40%**.
- Synthesized complex financial information into concise and actionable insights for internal and external audiences.

ZERODHA BROKING LTD. — Bengaluru, India

Assistant Manager (Coin Specialist) | May 2024 – March 2025

- Managed critical and high-value customer escalations across **Equity, F&O, and Mutual Fund** segments, taking ownership from issue identification through resolution.
 - Assisted HNI and retail clients with direct mutual fund structures, strategic asset allocation, and portfolio-related queries.
 - Investigated recurring customer issues and product/UI-UX bottlenecks using structured support data and communicated findings to cross-functional teams.
 - Worked closely with internal teams to identify improvement opportunities based on recurring customer pain points and support trends.
 - Maintained in-depth knowledge of investment products, platform functionality, and operational processes to provide accurate customer guidance.
 - Ensured compliance with SEBI mandates, regulatory updates, KYC/AML requirements, and internal processes during investor onboarding and capital routing.
 - Built long-term customer relationships while handling complex queries requiring product, market, and operational knowledge.
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EDUCATION

INDIAN INSTITUTE OF TECHNOLOGY (IIT), PATNA

Master of Business Administration (MBA) — Finance

Graduated: 2026

PATNA UNIVERSITY

Bachelor of Computer Applications (BCA)

Graduated: 2023

LICENSES & CERTIFICATIONS

- **AMFI Registered Mutual Fund Distributor** — ARN: 343205 | Valid till 2028
 - **NISM Series V-A: Mutual Fund Distributors Certification** | Valid till 2028
 - **NISM Series VIII: Equity Derivatives Certification** | Valid till 2027
 - **NISM Series VII: Securities Operations & Risk Management Certification** | Valid till 2027
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KEY PROJECTS & ACHIEVEMENTS

ScalpX Screener

- Engineered a high-frequency intraday screening tool integrating live market feeds, including **VWAP and volume-velocity spikes**, across a dynamic 100-stock watchlist.

Domain Agility

- Successfully transitioned from a technical BCA background into finance, trading, fintech operations, and client-facing roles across leading Indian brokerage and algorithmic trading platforms.
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ADDITIONAL STRENGTHS

- Strong curiosity and willingness to learn new financial and technical concepts.
- Comfortable handling intellectually challenging customer problems.
- Strong written communication and ability to simplify complex concepts.
- Proven ability to work independently and take complete ownership of tasks.
- Comfortable collaborating with Product, Engineering, Operations, and business teams.
- Strong understanding of the Indian capital-market ecosystem, derivatives, options strategies, and retail trading workflows.