



Vineet Sharma

Finance/ Investment Banking IT Professional Trainer

Corporate trainer, consultant and industry practitioner with deep experience across Investment Banking, Capital Markets, FinTech, Payments, Treasury, Agile Delivery, Business Analysis, Product Ownership, Project Management, Data Governance and Leadership Development.

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17+

Years of Industry Experience

Across investment banking, capital markets, payments, agile and product delivery

10+

Organizations Served

Including JPMorgan, Morgan Stanley, Barclays, FIS, EY, Synechron, Bajaj Finance and more

150+

Training Programmes Delivered

Corporate workshops, university programmes and transformation engagements



Investment Banking/ Finance/Capital Market

Trade lifecycle, SWIFT operations and capital markets workflows



Agile Delivery/ Project Management

Agile labs, stakeholder collaboration and delivery coaching



Product Ownership

Product thinking, roadmap clarity and execution discipline



Leadership Development

Practical capability-building for teams and managers

5000+

Learners Trained

Across BFSI, IT, FinTech and consulting organisations

10+

Core Practice Areas

Capital Markets · Agile · Business Analysis · Product Ownership · Project Management · FinTech

TRUSTED BY LEADING BFSI, TECHNOLOGY & CONSULTING ORGANISATIONS

Corporate Training Engagements & Clients Served

Vineet's training footprint spans some of the most recognised names in global BFSI, technology and consulting. His engagements range from large-scale multi-module programmes for technology teams to specialised capital markets and agile workshops for banking operations and product organisations. Each engagement is tailored to the client's domain context, learner profile and business objectives — ensuring that training translates directly into improved delivery readiness, stronger stakeholder communication and reduced ramp-up time for new and transitioning professionals.



Jocata Financial Advisory & Technology

Delivered end-to-end Project Management and Agile Transformation training covering Scrum, Jira and stakeholder management for product and technology teams, with structured sprint simulations and real project assignments.



Bajaj Finance Ltd.

Designed Agile and Project Management workshops for credit, lending and digital transformation teams, focusing on sprint execution, backlog management and stakeholder governance frameworks.



Imarticus

Conducted Capital Market and Treasury Domain Training for functional teams and Business Analyst learners, with sessions on project ownership, trade operations and client communication.



Kyndryl

Delivered Core Banking System (CBS) and Temenos-focused domain learning for technology and operations teams transitioning into banking technology roles.



Synechron Technologies

Delivered Business Analysis, Product Owner and Capital Markets training emphasising SDLC, BRD, FRD, agile alignment and BFSI delivery readiness for functional and technology teams.



Zensar Technologies

Led multi-module programmes on Agile, Jira, Business Analysis, Product Ownership and Project Management best practices for technology delivery and client-facing teams.



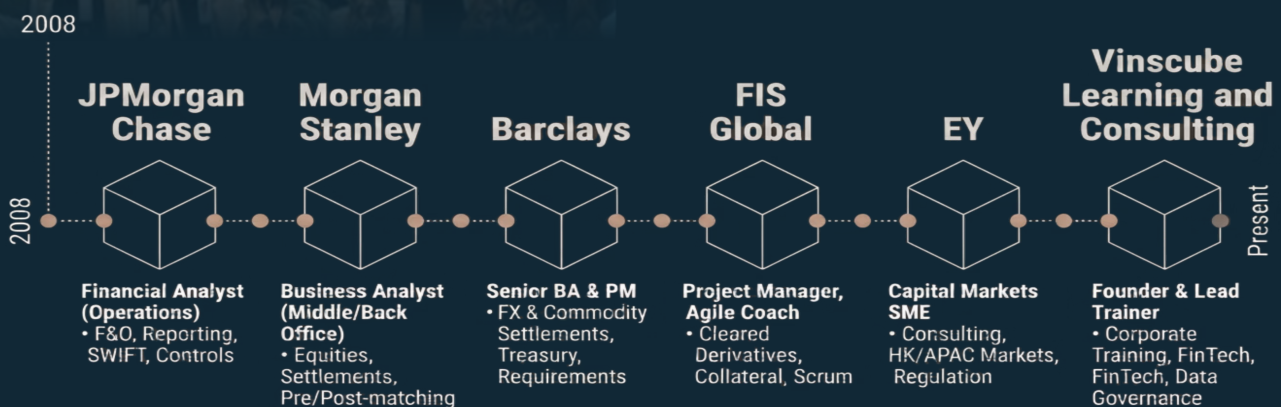
EY (Ernst & Young)

Delivered Trading Training for Hong Kong and APAC market programmes, providing global trade finance exposure, regulatory context and capital markets operational knowledge.

From Global Banking IT solution Building to Corporate Capability Building



The career trajectory is a masterclass in domain depth, operational breadth and continuous evolution. From the high-stakes trading floors of global investment banks to the structured rigour of technology transformation programmes, every chapter of this professional journey has been defined by complexity, scale and direct accountability. This lived experience spanning front office, middle office, back office, product delivery and corporate learning is what makes these training programmes uniquely credible and immediately applicable.



This journey allows training not from theory alone, but from lived experience across front office, middle office, back office, product delivery, technology transformation and corporate learning environments. Each role added a new dimension from trade operations and settlement workflows at JPMorgan and Morgan Stanley, to FX and treasury at Barclays, to Agile product delivery at FIS Global, to capital markets consulting at EY, and finally to full-spectrum capability building through Vinscube. The result is a trainer who understands not just what to teach, but why it matters in real projects, real teams and real organisations.

Front Office Exposure

Trade lifecycle, equities, derivatives, FX, fixed income and real-time market operations across global desks

Middle & Back Office

Settlements, reconciliations, custody, corporate actions, regulatory reporting and operational risk management

Product & Technology

Agile delivery, Scrum facilitation, product backlog management, sprint execution and global client programmes

Consulting & Training

Capital markets consulting, regulatory transformation, client engagement and large-scale corporate capability building

Domain Expertise & Capability Matrix

FULL CAPABILITY PROFILE

This expertise spans the full spectrum of BFSI, technology and professional development domains. The capability wheel below illustrates the breadth and depth of the practice areas — each domain backed by direct operational experience, consulting engagements and structured training programmes. This is not a theoretical knowledge base; it is a practitioner's toolkit refined across global organisations and thousands of learner interactions.

Each domain below represents hands-on capability built through delivery, advisory and training across regulated financial environments, digital transformation initiatives and enterprise learning programmes.

Capital Markets & Investment Banking

Trade Lifecycle & Operations

Trade booking, validation, matching, confirmation, domestic and international settlements, pre-matching, post-matching, clearing, custody, corporate actions, static data management, reference data management, middle office support, desk control and operational risk.

Reconciliations & Risk

Cash reconciliation, position reconciliation, nostro reconciliation, depot reconciliation, margining, collateral management, risk and P&L reconciliation, break resolution and regulatory reporting under MiFID II, EMIR, Dodd-Frank, FATCA, SFTR and Basel III.

Asset Classes

Equities, equity derivatives, futures, options, swaps, forwards, fixed income, FX, commodities, energy products, securities lending and borrowing, repo, netting and settlement operations.

Payments, Treasury & FinTech

Payment Systems

SWIFT messaging (MT103, MT202, MT540–MT599), payment investigations, RTGS, NEFT, SEPA, ACH, CHAPS, SWIFT GPI, payment gateways, transaction monitoring, AML, KYC and reconciliation automation.

Treasury & Cash Management

Treasury operations, FX and money market settlements, corporate treasury, liquidity management, cash management, interbank payments and corporate treasury workflows.

FinTech & Digital Banking

Open banking APIs, blockchain, cryptocurrency, digital assets, FinTech architecture, digital banking and payment innovation.

Business Analysis, Product Ownership & Agile

Business Analysis

Requirement elicitation and prioritisation, business process modelling, use case diagrams, BRD, FRD, functional and non-functional requirements, gap analysis, RTM, data flow diagrams, BPMN 2.0, business rules documentation, impact analysis, feasibility study, UAT, test case review and change request management.

Product Ownership

Product vision, roadmap, backlog management, epic decomposition, user story writing, acceptance criteria, definition of done and ready, MVP definition, MoSCoW, WSJF, value stream mapping, customer journey mapping, product lifecycle management and KPI/OKR alignment.

Agile, Scrum & SAFe

Scrum framework, Kanban, sprint planning and execution, daily stand-up, sprint review and retrospective, backlog refinement, release planning, agile metrics (velocity, burn-down, burn-up, throughput, lead time, cycle time), planning poker, Fibonacci estimation, Scrum of Scrums, SAFe, LeSS, agile governance, impediment tracking, team coaching, servant leadership and psychological safety. Tools: Jira, Confluence, YouTrack, Miro, MS Teams and Azure DevOps.

Project Management, Governance & Leadership

Project Management & PMO

Project initiation, charter, business case, stakeholder analysis, feasibility study, governance structure, RACI matrix, scope definition, WBS, scope baseline, activity sequencing, schedule development, milestone planning, critical path, Gantt chart, time and cost estimation, budget baseline, cost control, earned value management, variance analysis, quality planning and control, risk register, probability impact matrix, mitigation and contingency plans, communication plan, escalation matrix, resource planning, procurement, RFP, vendor evaluation, contract management, KPI tracking, lessons learned and project closure.

Governance & Leadership

Corporate governance, compliance awareness, professional conduct, ethics, stakeholder management, client-facing communication, SOP adherence, service delivery excellence, risk identification, issue management, escalation management, MIS reporting, executive dashboards, delivery governance, cross-functional leadership, programme governance, portfolio governance, executive communication, decision-making, accountability, audit readiness, control frameworks and operational excellence.

BlackRock Aladdin, Data, Insurance, US Accounting & AI

BlackRock Aladdin & Investment Lifecycle

BlackRock Aladdin concepts, investment lifecycle, portfolio management, order management system (OMS), IBOR concepts, reference data, front-to-back integration, trade lifecycle, risk and analytics orientation, operations workflow understanding and investment management ecosystem awareness.

Data Governance & Technology

Data governance frameworks, data lineage, root cause analysis, SQL for business and functional analysts, data validation, Excel, Power BI, dashboarding and reporting.

Insurance & US Accounting

Underwriting, policy administration, claims processing and adjudication, risk assessment, actuarial basics, premium calculation, reinsurance, life, health and general insurance, policy lifecycle, fraud detection, IRDAI, Solvency II, loss ratio, claims settlement, broker management, policy issuance, endorsements, renewals, insurance accounting, US taxation concepts, corporate tax Form 1120, partnership tax Form 1065 and Schedule K-1, book-to-tax adjustments, trial balance to tax return lifecycle and multi-entity/multi-jurisdiction tax concepts.

AI for Business Professionals

Applied AI concepts for BFSI and corporate professionals, AI-assisted analysis, automation awareness and practical AI tooling for business and functional roles.

Corporate Training Portfolio

This training portfolio is structured to address the full spectrum of capability needs across BFSI organisations, technology companies, consulting firms and academic institutions. Each programme is designed with a clear learning architecture – combining conceptual depth, practical simulation, tool-based labs and real-world case studies. The programmes are modular, scalable and can be customised for different learner levels, from fresh graduates to senior practitioners and leadership teams.



Capital Markets & Investment Banking

Capital markets training, investment banking operations, trade lifecycle, equities, FX, derivatives, fixed income, clearing, settlement, reconciliation, custody, corporate actions, collateral, margining, regulatory reporting and risk controls. Designed for BFSI functional teams, operations professionals and business analysts entering capital markets roles.



Payments, Treasury & FinTech

Payment systems, SWIFT, RTGS, NEFT, ACH, SEPA, CHAPS, SWIFT GPI, payment investigations, treasury operations, liquidity management, cash management, open banking, FinTech transformation, blockchain, cryptocurrency and digital assets. Ideal for treasury teams, payment operations and FinTech product teams.



Business Analysis & Product Ownership

Business analysis masterclass, requirement gathering, BRD, FRD, user stories, agile BA, product owner training, product roadmap, backlog prioritisation, acceptance criteria, stakeholder management, UAT and product delivery simulations. Suited for BA teams, product managers and aspiring product owners in BFSI and IT.



Agile, Scrum & Jira

Agile and Scrum framework, Scrum ceremonies, sprint planning, backlog refinement, retrospectives, agile metrics, Jira and Confluence training, agile transformation, agile coaching, SAFe overview and Scrum Master enablement. Designed for agile teams, scrum masters, product owners and transformation leads.



Project Management & PMO

PMBOK-based project management, project charter, WBS, scope, cost, time, quality, risk, stakeholder management, MS Project, Jira, governance, reporting, PMO templates and real project simulations. Targeted at project managers, PMO leads and programme coordinators across BFSI and IT.



Data, Governance & Technology

SQL for business and functional analysts, data analyst training, Excel, Power BI, data validation, dashboarding, reporting, data governance, data lineage and root cause analysis. Designed for functional analysts, data teams and governance professionals.



Leadership & Professional Skills

Team leadership, people management, effective communication, stakeholder management, professional grooming, process excellence, business transformation, client communication and managerial effectiveness. Designed for emerging leaders, team leads and managers across BFSI and technology organisations.

Training Methodology & Learning Design

This training methodology is built on a simple but powerful principle: learning must mirror the work. Every programme is designed to reduce the gap between classroom understanding and on-the-job application. This is achieved through a carefully sequenced blend of instructor-led sessions, live case studies drawn from real banking and technology environments, hands-on tool labs, role-play simulations and structured assessments. The methodology ensures that learners do not just understand concepts — they can apply them from day one in their roles.



Instructor-Led Training

Structured, facilitator-led sessions with real-world context, live Q&A and adaptive pacing based on learner response and engagement levels.



Live Case Studies

Real banking and technology case studies drawn from JPMorgan, Morgan Stanley, Barclays, FIS and EY engagements — making every concept grounded in operational reality.



Banking Workflow Simulations

End-to-end trade lifecycle, SWIFT payment and settlement simulations that replicate actual operational workflows used in global investment banks.



Agile Role Plays

Immersive Scrum ceremonies, sprint simulations and stakeholder role-play exercises that build agile muscle memory and team dynamics.



Project Assignments

Structured project assignments with real deliverables — charters, BRDs, user stories, sprint plans and risk registers — that learners can take directly into their roles.



Jira & Confluence Labs

Hands-on tool labs with Jira, Confluence and Azure DevOps, enabling learners to configure boards, manage backlogs and run sprints in a live environment.



Templates & Handouts

Comprehensive, ready-to-use templates including trade lifecycle diagrams, SWIFT message samples, product backlog sheets, sprint planning templates and project charters.



Pre & Post Assessments

Scenario-based evaluations, pre-training diagnostics and post-training feedback loops to measure learning impact and identify areas for reinforcement.

Certified Practitioner. Industry SME. Corporate Trainer.

CREDENTIALS, TOOLS & VALUE PROPOSITION

Credibility is anchored in three interconnected identities: practitioner, consultant and trainer. Experience comes from working inside real investment banking and capital markets environments, participating in large-scale business transformation and product delivery programmes, and converting that accumulated experience into practical, simulation-based corporate training. Certifications span project management, agile, business analysis, investment banking operations and capital markets — providing formal validation of the operational expertise brought to every training engagement.

Professional Certifications

- PMP – Project Management Professional
- CSPO – Certified Scrum Product Owner
- CSM – Certified ScrumMaster
- CBAP / IIBA – Business Analysis Certification
- SAFe Agilist
- Lean Six Sigma Green Belt
- Jira and Confluence Certification
- CISI – Investment Banking Operations Certification
- NCFM – Equities, Derivatives and Bonds

Tools & Platforms

Agile & PM Tools

Jira, Confluence, YouTrack,
Azure DevOps, Trello, Miro,
MS Project

Analysis & Design

Lucidchart, Visio, Figma,
Power BI, SQL, Excel,
Postman

Enterprise Platforms

ServiceNow, SharePoint, MS Teams

The Three-Pillar Value Proposition

The differentiator is the rare combination of three professional identities that rarely converge in a single trainer. Most trainers offer theory. Most practitioners offer experience. Both are offered — structured into programmes that are immediately applicable, organisationally relevant and learner-centric. This three-pillar model is what sets this training apart from conventional classroom instruction.



Practitioner

Worked across JPMorgan Chase, Morgan Stanley, Barclays, FIS Global and EY — in live investment banking, capital markets, payments and technology transformation environments. Every concept taught is grounded in real operational experience.



Consultant

Capital markets consulting, product ownership, business transformation, business analysis, agile coaching and project governance experience across global organisations. Brings a consulting rigour to programme design and delivery.



Trainer

5,000+ learners trained, 150+ programmes delivered, corporate workshops, simulations, templates and capability-building programmes across BFSI, IT, FinTech and academic institutions. Proven track record of measurable learning outcomes.

Programmes are designed to reduce ramp-up time, improve delivery readiness, strengthen stakeholder communication, increase domain confidence and help learners apply concepts directly in real projects — from the first week on the job.

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I Founder & Lead Trainer, Vinscube Learning & Consulting | Corporate Trainer | Investment Banking Specialist | Capital Markets SME | Agile Coach | Business Analyst Trainer | Product Owner Trainer | Project Management Trainer | FinTech, Payments & Data Governance Consultant

For feedback and reviews please visit LinkedIn :- linkedin.com/in/connectwithvineet