

Gauri Lad

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EDUCATION

Weatherhead School of Management, Case Western Reserve University , Cleveland, OH, USA	05/2024
Master of Finance, Financial Big Data Analytics	
Jamnalal Bajaj Institute of Management, Mumbai University , Mumbai, MH, India	05/2016
Master of Financial Management, Finance	

EXPERIENCE

Musk & Gale US, Great Cleveland Community Credit Union Project , Cleveland, OH, USA	05/2024 – Present
Analyst	
<ul style="list-style-type: none">Collaborated with vendors to implement DAO, resulting in a 25% reduction in manual onboarding time.Conducted risk assessments and worked with vendors to ensure secure integration of DAO and RDC systems, addressing potential vulnerabilities in online authentication processesResearched and implemented fraud detection algorithms to flag suspicious account-opening activities, enhancing overall system security	
SAS Financial & Accounting Services , Cleveland, OH, USA	01/2024 – 04/2024
Analyst Internship	
<ul style="list-style-type: none">Analyzing, interpreting and applying financial analysis, financial modeling and statistics.Manage and analyze large, complex data sets using Monte-Carlo Simulation and techniques. Generate data extracts and data reports for use in financial analysis.Utilized Python to extract, clean, and analyze large datasets, creating insightful dashboards in Power BI/Tableau to communicate findings.	
eBrandz , Mumbai, MH, India	08/2018 – 07/2022
Financial Data Analyst	
<ul style="list-style-type: none">Prepared comprehensive financial reporting materials for senior management, regulators, and auditors, ensuring compliance with company and regulatory standards.Prepared financial reports and forecasts, analyzing balance sheet and income statement figures to support key decision-making processes.Created and validated financial models for pricing derivatives, valuing assets, or assessing credit risk, ensuring accuracy and regulatory compliance.	

ACADEMIC PROJECTS

Monte Carlo simulation for Tech Stock Portfolio
<ul style="list-style-type: none">Developed a Monte Carlo simulation model to analyze portfolio value projections and assess risk-return profiles using historical data of U.S. tech stocks, incorporating real-world market volatility and uncertainty.Implemented advanced stochastic processes and random sampling techniques to simulate thousands of portfolio outcomes, enabling data-driven insights for diversification and risk management strategies.
Portfolio Optimization using modern portfolio theory
<ul style="list-style-type: none">Designed a portfolio optimization framework using modern portfolio theory to maximize returns for specific risk levels, leveraging the Markowitz efficient frontier and incorporating real-world constraints such as sector caps, allocation limits, and transaction costs.Conducted stress testing and sensitivity analysis under varying market conditions to enhance portfolio robustness and improve risk-adjusted returns.
Financial Modeling using AI & Machine Learning
<ul style="list-style-type: none">Developed a Python-based Daily Trading Strategy, incorporating data-driven insights, quantitative models, and risk-adjusted performance metrics to predict short-term market movements and optimize trading decisions.Designed and implemented modular algorithms for financial data retrieval, cleaning, visualization, and strategy evaluation, demonstrating strong expertise in financial modeling and machine learning techniques.
Factor Model for Equity Portfolio Management
<ul style="list-style-type: none">Built a multi-factor model to analyze equity portfolio performance, identifying drivers like value, momentum, and volatility. Optimized factor exposures by decomposing returns into alpha and beta components.Performed back-testing to evaluate predictive accuracy and provided insights for rebalancing strategies to enhance portfolio diversification.
Programming Languages: Python, SAS, SQL
Databases and tools: Panda, NumPy, Matplotlib, Advance Microsoft Excel (Pivot tables, VLOOKUP, charts, data validation)
Relevant Skills: Financial Modeling, Financial Analysis, Client Reporting & Communication, Technical Proficiency, Project Management & Collaboration, Attention to Detail & Organizational Skills,