# PARV AGGARWAL

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## SUMMARY

**Finance leader** with proven expertise in **financial planning**, **regulatory compliance**, and **strategic investment management**. Demonstrated success in driving **financial efficiency**, optimizing capital structures, and supporting **organizational growth** through **data-driven financial strategies**. Adept at managing complex financial operations, advising on M&A, and delivering strategic insights that enhance corporate financial health. Ready to leverage advanced knowledge in **quantitative finance** and lead financial management at an executive level.

## EDUCATION

**Northeastern University** — **Boston, MA, USA**
Master of Science in Quantitative Finance- **CFA** affiliated course — September 2023 - Present

**Institute of Management Technology** — **Delhi, IN**
Post Graduate Diploma in Management- Business Analytics — January 2022 – December 2023

**Guru Gobind Singh Indraprastha University** — **Delhi, IN**
Bachelor of Business Administration — August 2018 – June 2021

## WORK EXPERIENCE

**America's SBDC** — **New York, United States, US**
**Financial Strategy & Business Consulting Intern**

- **Advised 20+ clients** across various industries on **financial planning**, **budgeting**, and **capital structure** decisions, resulting in **successful funding applications** and facilitating **business expansions**.
- Developed **long-term financial projections** and **strategic business plans**, directly contributing to clients securing **investor funding** and achieving **financial growth targets**.
- Conducted **financial analysis** for business valuations and **M&A preparation**, providing **actionable insights** that guided **high-value strategic decisions** for clients.
- Enhanced **operational efficiency** by designing and delivering **financial reports** using **Power BI**, significantly improving clients' **financial performance** and decision-making.

**KJLK & Co., LLC,** — **Tulsa, US**
**Financial Analyst Intern**

- Led investment research for **$20M+ portfolios**, driving **15% portfolio returns** and reducing risk by **10%** through data-driven investment strategies.
- Developed and implemented financial models, enhancing **forecast accuracy by 20%**, supporting key investment decisions, and improving asset allocation confidence.
- Collaborated with senior analysts to deliver **executive-level financial reports**, ensuring **100% accuracy** in complex financial strategies, leading to a **25% increase** in client engagement and satisfaction.
- Played a pivotal role in shaping **$10M+ investment proposals**, translating financial insights into actionable strategies for **capital allocation** and **risk management**.

**Ernst & Young (EY)** — **Gurugram, Haryana, IN**
**Lead Associate**, **Financial Strategy & Compliance**

- **Led financial planning** and **regulatory compliance** for high-value clients, driving a **30% efficiency increase** through streamlined audit processes. Partnered with senior executives to ensure **financial reporting accuracy** and alignment with corporate strategic objectives.
- Spearheaded **business development efforts**, pitching financial services and solutions to existing clients, securing additional projects that contributed to **10% revenue growth** within the division.
- **Pioneered innovative audit procedures** by developing a **cost and budget analysis framework**, utilizing Power BI and Macros to automate routine tasks, thereby reducing manual work by over 20 hours per month.
- Prepared **comprehensive financial reports** for a diverse clientele, ensuring **100% accuracy** in monthly financial statements and adherence to grants & contracts, which improved financial transparency and **reduced audit discrepancies by 15%.**
- Spearheaded the development and **maintenance of robust communication pathways**, including automated client feedback loops and compliance checks, achieving a **95% client satisfaction rate** and maintaining a **perfect compliance record** in a highly regulated environment.
- Led **cross-functional teams** to develop and implement **financial strategies**, improving **operational efficiency** and driving company-wide growth initiatives.

**AON plc.** **Gurugram, Haryana, IN**
**Senior Analyst**

- **Led comprehensive financial analysis** of health benefits datasets, leveraging advanced statistical methods to uncover trends and inform **senior management's risk management strategies**, contributing to a **25% reduction** in risk exposure.
- Developed **predictive models** and performed **root cause analyses** that improved **operational resilience** and guided **strategic risk mitigation** for high-value clients.
- **Streamlined international claims processing** by designing advanced reporting systems using **SQL** and **Tableau**, improving operational efficiency by **20%** and optimizing resource allocation.
- Spearheaded a **cross-functional initiative** to enhance the health benefits enrollment process using **cloud technology**, achieving a **100% SLA fulfillment rate** and significantly improving client satisfaction.
- Designed and managed **compliance and feedback systems**, maintaining a **95% client satisfaction rate** and ensuring full **regulatory compliance** across global operations.

## SKILLS

**Technical:** Financial Modeling & Analysis, Financial Planning, Regulatory Compliance (NCUA), Cash Flow Management, Corporate Finance Strategy, Budgeting, Capital Structure Optimization, Valuation Techniques, SQL, Data Visualization-Tableau, Power Bi, Excel (pivot tables, vlookup, and macros)
**Interpersonal:** Strategic Planning, Team Leadership.

## CERTIFICATIONS

- MERIT Training - NCUA Compliance & Credit Union Governance to enhance understanding of **NCUA compliance, regulatory reporting**, and **credit union governance**.
- CPA Certification (Considering Pursuit)
- Comprehensive Guide to Financial Markets, Investing & Trading (Udemy, June 2023)
- Lean Six Sigma Yellow Belt Certification (AIGPE, May 2023)

## ACADEMIC PROJECTS

**Midland Energy Resources - Cost of Capital Analysis** December 2023

- Analyzed and calculated **WACC** for multiple divisions, providing recommendations on **capital structure**, **debt capacity**, and **investment decisions** to enhance financial resilience.
- Informed strategic decisions on **stock buybacks** and **M&A** using **CAPM** and risk management principles to optimize corporate growth.

**Investment Portfolio Optimization Project** December 2023

- Conducted **Markowitz Portfolio Optimization** using historical price data to determine optimal portfolio allocation, reducing portfolio variance and enhancing **risk management**.
- Applied the **Single Index Model** to assess asset risk relative to market indices, providing insights that drove strategic investment decisions.

**M&A Case Study|| Bloomberg Terminal, Yahoo Finance, Capital IQ** March 2024

- Led in-depth financial analysis of the **Spotify-Peloton merger**, utilizing **trading multiples**, **accretion/dilution models**, and financial forecasts to evaluate the transaction's long-term strategic fit within the tech industry.
- Provided actionable recommendations on **synergies**, **cost efficiencies**, and **market expansion opportunities**, aligning the merger's financial impact with broader industry and corporate growth objectives.

**Quantitative Portfolio Management Project** June 2024

- Applied **Random Forest** and **PCA** to predict semiconductor stock returns, refining portfolio strategies to achieve a **41% return**, stabilizing risk during volatile periods.
- Designed a dynamic portfolio rebalancing framework, optimizing asset allocation based on evolving market conditions, which improved **risk management** and **stabilized returns** during volatile periods.