

# Sonali Gupta

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## Experience :-

**Money Honey Financial Services Pvt. Ltd. ( Investment Specialist )** **June-september 2024**

- To service existing investors by sending upcoming investment products and handling their portfolio. Follow through on the investment action approved by clients.
- Identify investors for mutual funds and Educate existing and new clients regarding the range of applicable investment options available to them.
- Prepare various reports like AUM Performance, Strategy wise summary.

**Infinite financial experts ( Finance Intern )** **May-August 2023**

- Acquired skills in scenario analysis, risk assessment, and financial performance evaluation to support strategic business decisions.
  - Learned to create dynamic financial models for budgeting, sensitivity analysis, mergers & acquisitions (M&A), and discounted cash flow (DCF) analysis.
  - Developed proficiency in building and analyzing financial models used for valuation, forecasting, and decision-making.
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## Projects :-

**Credit card financial dashboard using power bi**

- Developed interactive dashboard using transactions and customers data using SQL database, to provide real time insight.
- Streamlined data processing and analysis monitor key performance metrics and trends.
- Share actionable insights with stakeholders based on dashboard findings to support decision making process.

**Amazon Sales Dashboard (Power BI)**

- Created dynamic visualizations (bar charts, line graphs, and KPIs) to highlight sales patterns, growth opportunities, and financial forecasts.
  - Built an interactive Power BI dashboard to analyze Amazon sales data, providing insights into key metrics such as revenue, profit margins, and customer trends.
  - Visualized product performance and sales across various categories, enabling easy tracking of high-performing products and regions.
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## Skills :-

**Data Visualization :** ( Tableau, Microsoft Power BI,)

**Data Analysis :** ( Microsoft Word, Excel, PPT )

**Financial Modelling :** ( forecasting , data mining, data valuation)

**Soft skills :** (Research and Development, Time Management, communication )

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## Education :-

KES' B K Shroff College of Arts & M H Shroff College of Commerce Autonomous College **2020-2023**  
**Bachelor of Accounting and Finance** **7.15 CGPA**

Bal Bharati Maghanmal J. Pancholia College of Commerce **2018-2020**  
**XII** **74%**

Shri Jamnadas Adukia Balika Vidyalay **2017-2018**  
**X** **68.80%**