Krati Sharma

Phone: +91-8223875911
Email: sharmakrati21@gmail.com

PROFILE SUMMARY

- Experienced Financial Analyst with a demonstrated history of working in the field of research and financial analysis for more than 4 years
- Adept at collecting, analysing, and deriving insights from large datasets, developing predictive forecasting models, and performing data visualizations
- Possessing an extensive analytical skill, strong attention to detail and a strong ability to effectively communicate and collaborate in a team environment

WORK EXPERIENCE

Organization: PitchBook, Morningstar

Role: Associate Team Lead	**Duration: Jan '23 – Present**
Role: Quality Assurance Specialist	**Duration: Apr '22 – Dec '22**
Role: Senior Research Associate	**Duration: Oct '21 – March '22**
Role: Research Associate	**Duration: March '20 – Sept '21**

Responsibilities:

- Assist in managing and developing a team of 10+ Data Research Analysts by providing clear direction, establishing goals, and optimizing resource allocation for processes/projects
- Ensure appropriate methods and techniques to improve and maintain highest quality standards in the data collected by team
- Set goals and priorities for the individuals in the team in consultation with the Global Process Owner, Data Leaders and Global Data Director
- Conduct performance reviews of each team member and explain/set career development paths and opportunities for team members
- Tabulate and update valuations of existing companies in the PowerBI dashboard delivering clients with organized data to meet their investment needs
- Present various Power BI and SLA reports to Global Process Owner, Data Leaders and Global Data Directors
- Conduct data research - industry, sector & market research and worked on valuation of venture capital backed private companies across major global markets covering geographies that includes North America, Europe and APAC regions
- Analyse fundamental data for company's income statement, cash flow statement, balance sheet, and other fundamental data sets
- Collect and analyse equity fundamentals data for global market and take ownership in data quality controls to ensure consistent and high-quality data are manufactured to meet product requirements
- Manage data as per client-specific requirements while at the same time adhering to Morningstar's set KPIs
- Develop a thorough understanding of the various filing nomenclature of countries under coverage
- Closely work with quality assurance and technical department to resolve clients' data issues timely and effectively
- Participate in other data and process related projects like industry/market data collection methodology research, market expansion, process certification, new product development support

- Confirm that data belongs to specific entities tracked in the PitchBook Platform using various research techniques
- Link tracked entities to national and state registries of different countries by identifying the unique identification number that match the entity
- Extract financial information from these registries once the entity is identified and matched
- Fill up financial information for entities based on sources other than registries

EDUCATION SUMMARY

MBA, Financial Administration (2017-19)
Prestige Institute of Management and Research, Indore

Bachelor of Engineering, Electronics & Telecommunication (2013-17)
Swami Vivekanand College of Engineering, Indore

TECHNICAL SKILLSET

- Languages: R, SQL
- Reporting and Visualization Tools: Power BI, Tableau, Minitab
- Quantitative and Analytical Skills: Advanced statistics, Data Visualization

PUBLICATIONS & CERTIFICATIONS

- Lean Six Sigma – Green Belt
- Python for Data Analytics & Reporting Essentials (with R, Tableau & Power BI) by NSE
- Financial Modelling