

Gunjan Shah

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Summary

Financial Analyst with over 5 years of experience in financial risk assessment, credit analysis, and data analytics. Contributed to financial institutions through payment modernization, data and AI advancements, and risk mitigation using tools such as Python, SQL, and Excel. Notable projects include supporting business development through detailed credit memos and internal audit procedures. Aiming to leverage analytical skills to make data-driven recommendations and take product initiatives.

Skills

In-depth understanding of company's financial statements, knowledge of IFRS, IndAS, and US GAAP accounting standards/treatments, finance and economics theories, valuation of equity, derivatives, fixed income, and other asset classes, data manipulation, data visualization, data analysis, Excel, Python, SQL, financial modelling, scenario analysis, web scraping, analytical skills, numerical skills, articulative skills, presenting to an audience, content writing, Google Sheets and Statistics.

Work Experience

Datanimbus, INC

Plano, TX, USA

Business Development Analyst

Apr 2024 – Nov 2024

- Supported business development and sales teams by assisting account executives, writing database queries, and building insightful tools for data-driven decision making.
- Led qualitative and quantitative analysis on the Datanimbus Finhub platform, empowering Financial Institutions with data and AI-driven advancements for new revenue streams, operational efficiency, and risk mitigation.
- Developed and maintained automated reports utilizing SQL and Python, providing actionable insights to internal business stakeholders and external partners.

University of Connecticut, Stamford

Stamford, CT, USA

Math Tutor

Jan 2022 - Jan 2023

- Conducted personalized tutoring sessions for students at the University of Connecticut, Stamford, specializing in a comprehensive range of mathematical disciplines, including Algebra, Geometry, and Advanced Trigonometry, successfully clarifying concepts and solving queries to enhance academic performance.
- Awarded 'Tutor of the Month' for September '23.

Citicorp Services India Pvt. Ltd (Citi Group)

Mumbai, India

Credit Analyst

Jan 2021 - Jan 2022

- Worked in the Independent Risk Assessment Unit (IRAU) of the bank. Performed fundamental credit analysis and communicated key findings in yearly and quarterly credit memos to various stakeholders for Banks, NBCF's and other financial institutions for India, Sri Lanka, and Bangladesh region.
- Conducted presentations on quarterly results of the portfolio companies to multiple teams, including Risk and Banking seniors.

Morningstar India Financial Services

Mumbai, India

Research Associate

Jan 2019 - Jan 2020

- Worked under the Pitchbook team, which provides financial data on VC, PE, and M&A space covering the global market. Collated key data points on private companies in Venture Capital and Early-Stage space primarily in the NA (North America) region.
- Showcased the private market ecosystem, including various types of funding, key deals, management, business model for various start-ups and early-stage companies on the platform.

N C Chhajed & Associates Chartered Accountants

Mumbai, India

Audit Assistant

Jan 2016 - Jan 2019

- Performed audit procedures on specific financial line items under the supervision of senior team members with the objective of ensuring that the financial statements are prepared, in all material aspects, in accordance with the applicable financial reporting framework.
- Carried internal audit of the company's books of accounts and finalization of books & financial statements.
- Assisted with tax audits and tax returns.

Education

University of Connecticut (UConn), <i>Master's in science (MSc) in Financial Risk Management (FRM)</i> .	Stamford, CT, USA Aug 2022 – Dec 2023
Chartered Financial Analyst (CFA) Institute <i>Level III Candidate of Chartered Financial Analyst (CFA) program</i> .	Mumbai, India 2018 - 2022
Affiliate Member of Association of Chartered Certified Accountants (ACCA) <i>IFRS accounting, Audit, and Assurance, Financial Management, Corporate Law, and Taxation.</i> .	Mumbai, India Jan 2016 - Jan 2018
Institute of Management (IIM) Indore <i>Business Analytics (IPBA)</i> .	Indore, India Jan 2019 - Jan 2020
Gujarat University . <i>Bachelor of Commerce (B.com)</i> .	Ahmedabad, India Jan 2014 - Jan 2017

Projects

<i>Bloomberg Trading Challenge</i> <ul style="list-style-type: none">• Defined market assumptions• Developed a return-generating strategy• Executed trades within a closed network• Developed familiarity with Bloomberg terminal and US markets	Jan 2023 - Dec 2023
<i>Summer Analyst Capstone Project from Citi, NY</i> <ul style="list-style-type: none">• Analyzed and presented the fintech and mortgage buying industry• Focused on the business practices and risk mitigation framework of Rocket Mortgage	Jan 2023 - Dec 2023