

Udaya Lakshmi Punnam

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PROFILE SUMMARY

- Financial Analyst with 2 years of experience in financial modeling, data interpretation, and performance analysis.
- Skilled in financial statement analysis, forecasting, ratio analysis, and budgeting to deliver accurate insights that support timely business decisions.
- Proficient in MS Excel, Python (NumPy, Pandas, Matplotlib, Seaborn, SciPy, Plotly), Tableau, and MySQL for data analysis, visualization, and reporting.
- Experienced in reconciliation and financial data management using Raiser's Edge, optimizing reporting accuracy and operational efficiency.
- Committed to maintaining precision in financial reporting, meeting deadlines, and fostering effective collaboration across teams.
- Proven ability to work cross-functionally to streamline reporting processes and enhance financial transparency.

SKILLS

Languages: Python

Packages: NumPy, Pandas, Matplotlib, Seaborn, SciPy

Visualization Tools: Tableau, MS Excel

Databases: MySQL

Business Tools: MS Word, MS Excel, MS PowerPoint, Citrix Access – Raiser's Edge NXT (Data Entry & Management, Batch Processing), QuickBooks

Financial Analysis: Ratio Analysis, Variance Analysis, General Ledger & Reconciliation, Forecasting & Financial Modeling

Regulatory Standards: Familiar with GAAP; knowledgeable in financial compliance and reporting accuracy

Core Strengths: Data Accuracy, Workflow Prioritization, Team Coordination, Quantitative Analysis, Reporting Precision

WORK HISTORY

PBITS INC., Remote

Mar 2025 – Present

Financial Analyst

- Delivered 10+ monthly financial reports and dashboards, analyzing \$5M+ in revenue and expenses to provide insights that guided management decisions.
- Supported budgeting and forecasting for 5+ business units, providing variance analysis that boosted forecast accuracy by 12%.
- Redesigned reporting and reconciliation processes, reducing manual data entry by 20% and raising data accuracy from 85% to 95%.
- Collaborated with finance, operations, and IT teams to accelerate reporting turnaround time by 15%.

Sacred Heart University, Fairfield, CT, USA

Sep 2023 – Jun 2024

Graduate Assistant – Financial Analysis

- Enhanced reconciliation accuracy by 15% using Raiser's Edge while ensuring compliance with financial regulations.
- Processed and maintained 200+ records weekly, boosting donation acknowledgment efficiency.
- Reconciled 1,000+ records monthly with the general ledger, achieving 98% accuracy in financial reporting.
- Oversaw batch processing for checks, memberships, and ledger postings, maintaining precision in transaction tracking.
- Coordinated with departments such as student accounts, IT, and payroll to streamline workflow efficiency.
- Elevated donor engagement by 20% and donations by 10% through targeted reporting and analysis.
- Automated key reporting tasks, expediting data entry by 20% and refining workflow consistency.
- Resolved discrepancies and supported variance analysis to uphold financial integrity.

MR Print Solutions

Aug 2022 – Apr 2023

Finance Intern

- Assessed financial statements and expense trends, identifying cost-saving opportunities that strengthened financial performance.
- Conducted variance analysis on income statements and balance sheets, recommending actions that cut operating expenses by 12%.
- Assisted with budget forecasting, improving accuracy in financial planning and performance tracking.
- Generated Excel-based reports that enhanced the clarity and timeliness of management insights.

Kusalava International Ltd., Vijayawada, India

Nov 2021 – Jan 2022

Finance Analyst Intern, Ratio Analysis

- Built a financial model within 3 months, fortifying liquidity management and decision-making.
- Performed detailed ratio analysis for Kusalava Hyundai, revealing a 25% decline in debt-equity ratio and long-term liquidity risks.
- Proposed strategies that raised liquidity by 20%, shortened debtor collection by 15%, and improved profitability through asset optimization.
- Compiled and presented financial reports and insights to senior management using MS Word and PowerPoint.

PROJECTS

Comparative Analysis of Target & Walmart

- Optimized Target’s supply chain through reverse factoring and supplier negotiations, identifying \$1.08B in potential savings and improving working capital by 8%.

Amazon Sales Data Analysis

- Analyzed sales performance data, identifying top-performing regions contributing 25% to total profits and driving 30% category dominance for targeted marketing.

USA Housing Listings

- Built a predictive model using Gradient Boosting with 99% R² accuracy, minimizing Mean Absolute Error by 99% and boosting property investment assessment.

RELEVANT STUDIES

MySQL: Gained hands-on experience in writing SQL queries for data extraction, cleaning, and analysis as part of the Business Analytics master’s program at Sacred Heart University.

EDUCATION

Master of Science in Business Analytics
Sacred Heart University, Jack Welch College of Business, Fairfield, Connecticut
C GPA: 3.934

Aug 2023 – Dec 2024

Bachelor of Business Administration in Finance
ISBM University | Gates Institute of Management & Sciences, India

Aug 2019 – Jul 2022