SARTHAK MITTAL

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PROFILE

Strategy & investments professional with 8+ years across Deals Transformation/M&A (PwC Deals), Acquisitions & Asset Management (Nitya Capital), and Enterprise/Value transformation (PwC EFS/ESV). Track record highlights include 40+ acquisitions and $1.6B+ closed, synergy valuation and tracking on an $8B transaction, analytics-led automation cutting 30+ hours/week, and design of cost and growth roadmaps for large-scale transformations.

Key Skills: Financial Modeling · Operating-Model Design · Due Diligence · KPI Trees · Cross-Functional Execution · Advanced Excel/VBA, Python, R, SQL, Tableau

CORE COMPETENCIES

Enterprise & Functional Strategy: North-Star programs, value case modeling, KPI tree, Data-led Target Operating Model (TOM), cost/value transformation roadmaps, customer/digital transformation, governance & controls (AI/privacy/Risk), PMO & governance

M&A / Investments: Commercial diligence, integration & separation (Day 1/100), synergy tracking/valuation, capital structuring, asset management, portfolio value creation.

Analytics & Execution: Financial modeling (DCF, waterfalls, NAV), scenario analysis, dashboards, business intelligence, project/program management, stakeholder management.

SELECTED HIGHLIGHTS

- $1.67B+ acquisitions closed; $300M+ dispositions supported.
- $8B deal synergy tracking with $25M functional synergies repository; 30+ hours/week saved via automation.
- Designed bank-wide case for a transformation blueprint with quantified value levers, governance, and control framework.

CORE EXPERIENCE

PricewaterhouseCoopers (PwC) — Senior Associate, Enterprise & Functional Strategy (EFS/ESV)
Bengaluru, India | May 2025 – Present

- Support a Fortune 50 client on Service Delivery Risk: quality audits, workflow assessments, contract audits, and access-management PMO.
- Translate strategy into execution via pilot playbooks, KPI trees, TOM/RACI, and cadence/RAID governance.
- Build value cases and benefits-tracking models (Excel/Python/SQL) to institutionalize decision cadence.
- Partner with Compliance/Risk to align AI/Privacy/Model-risk controls in delivery workflows.
- Designed a 3-phase transformation blueprint (0–6, 6–12, 12–24 months) for a universal-bank case: diagnostics, accelerated build, and industrialization with quantified value levers (containment, AHT reduction, collections uplift) and a KPI tree.

PricewaterhouseCoopers (PwC) — Senior Associate, M&A Deals Transformation
Chicago, USA & Bengaluru, India | Aug 2022 – Feb 2024

- **Co-led synergy valuation & tracking** for an **$8B** transaction; built an automated Excel database to capture **$25M** functional synergies and reduced weekly reporting time by **30+ hours**.
- Delivered integration/separation workstreams (Day-1/100 plans, TSA catalogues, risk, change, and communications) across multiple industries.
- Supported **commercial diligence** for a **$50M** deal in a **$1.8B** TAM (technology & healthcare benefits); market sizing, competitive scan, customer interviews, and value-creation thesis.
- Onboarded and managed consultants to deliver and institute playbooks for due diligences, integration management offices (IMO), and separation management offices (SMO).

Nitya Capital LLC — Financial Analyst → Senior Analyst → Associate, Acquisitions & Asset Management
Houston, USA | Sep 2017 – Jun 2022

- Completed **16+** acquisitions (**$1.67B**) and **5+** dispositions (**$300M**); evaluated 43+ multifamily & student-housing assets end-to-end (sourcing, underwriting, capital stack, diligence, integration).

- Built DCFs, waterfalls, NAV and sensitivity models; created KPI templates/dashboards for portfolio performance.
- Increased DD efficiency by **66%** fewer property inspections via risk-based sampling, standardized checklists, and KPI driven evaluation for effective modeling.
- Led financial analysis for **$1.5B**+ of AUM (≈**55** properties / **16k** units); built dynamic NAV & sensitivity models; established KPI templates for portfolio reviews.
- Coordinated internal/external stakeholders (brokers, lenders, legal, ops) to keep deal cycles on track.

ADDITIONAL EXPERIENCE

OurEarth BioPlastics — Founder & Advisor
Bengaluru, India | Feb 2024 – Present

- Advised/Spearheaded development of upcycling formulations for **polyolefin waste (PCR PP)** into near-virgin mechanical performance; help defined go-to-market, pricing, and pilot qualification standards.
- Built unit-economics and scale-up models (throughput, yield, capex/opex) to inform product-market fit and pricing.
- Set up lightweight **R&D-to-commercial** stage gates (formulation → trials → QC/QA), unit-economics models, and customer pitch collateral.

Inflection Point Ventures (IPV) — Manager, Investments & Portfolio Ops (Contract Experience)
Bengaluru, India | Dec 2024 – Jan 2025

- Established a sourcing and screening engine; led IC materials and deal memos; initiated portfolio operating cadence and value-creation playbooks (reporting, hiring, GTM).

Barrel Holding Co. — Front Office/Strategy Advisor, Private Equity (Contract Experience)
Remote, Company HQ: NY, USA | Oct 2024 – Jan 2025

- Built NAV models and portfolio dashboards to evaluate hold/sell decisions and track value creation across SMB acquisitions.
- Supported pipeline screening, preliminary underwriting, and IC materials for bolt-ons and exit readiness.

EDUCATION

University of Houston — M.S., Business Analytics (2022) — Houston, TX USA
Bentley University — B.S., Corporate Finance & Accounting (2017) — Waltham, MA USA

TECHNICAL & ANALYTICAL SKILLS

Finance & Deals: Financial Modeling (DCF, LBO, NAV, Waterfall), Valuation, Synergy Modeling, Due Diligence (CDD/ODD/IDD), Portfolio/Asset Management, PMO/IMO/SMO
Analytics & BI: Advanced Excel & VBA, Tableau, SQL, data modeling, dashboard design
Programming: Familiarity of and working knowledge of Python, R (analysis/automation), Java, C++
Data/Systems: Bloomberg, FactSet, SAP, data management & governance
Strategy & Execution: Operating Model & TOM, KPI Trees & Benefits Tracking, Program/Project Management, Stakeholder Management, Agile.
Communication: Executive storytelling, memo writing, IC materials, client presentations.

CERTIFICATIONS & INTERESTS

FactSet Certified; Studying for CFA Level 1; Real-Estate Finance Coursework; Sustainability & Circular-Economy Initiatives; PE/VC Initiatives and Coursework; Algorithmic-trading Research; Predictive Analytics; Gen AI Research & Coursework