

SONIA BALANI

Accounting and Financial Management, 2B

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Summary of Qualifications

- Technical proficiency in Microsoft Excel, Microsoft Office, Microsoft PowerPoint, SQL, R and HTML
- Demonstrated outstanding teamwork and communication skills by leading a team at UWDECA case competitions
- Developed financial analysis and reporting skills through IFRS 17 and LICAT projects at OSFI
- Strong interest in financial services industry as shown through SQL project and PwC, Wharton online courses

Experience

Financial Accounting Co-op Student

Jan – Apr 2020

Office of the Superintendent of Financial Institutions (OSFI)

- Prepared multiple quarterly Life Insurance Capital Adequacy Test (LICAT) summary reports by analyzing over 70 different company datasets to highlight market trends and key drivers behind capital changes for senior management
- Designed a condensed Statement of Cash Flows to ensure compliance of regulatory financial statements with IAS 1, 7 and 34, and a condensed Statement of Profit or Loss for IFRS 17 progress reports by analyzing IAS 1 and 34
- Demonstrated financial statement analysis and Microsoft Excel skills by writing over 700 validation rules to increase the accuracy rate for 70% of quarterly Minimum Capital Test (MCT) statement data received from insurers

Data Analyst Intern

Jul – Aug 2019

VIBHA Technologies Inc.

- Gathered and loaded raw client and company storage metrics data into SQL tables to project the next 5 years of external storage growth and costs per client
- Leveraged Microsoft Excel and SQL skills to increase accuracy in projections by incorporating contract lengths, average new clients per year and average growth of data volume year over year per client
- Presented a consolidated solution which projected a 15% to 20% reduction in costs by transferring all client and company data into AWS cloud storage

Team Member

Sept 2018 – Apr 2019

University of Waterloo (UWDECA)

- Presented an analysis on performance ratios for a company based on their financial records
- Developed strong leadership skills while collaborating with a team in in-house and invitational case competitions

Projects

Tweeting Drives the Stock Market – SQL Project

Jul 2019

soniabalani.github.io/twitterproject.html

- Imported Tesla's historical stock data and Elon Musk's tweets into SQL tables
- Utilized SQL queries and a weighted sum formula to rank the top 20 days where the intersection of highest stock price movements and most activity with tweets exists
- Concluded with 65% confidence that there is a positive correlation between tweeting and the movement of the stock price after analyzing Elon Musk's tweets post categorization into Positive, Negative and Neutral

Education

University of Waterloo

Sept 2018 - Present

Candidate for Bachelor of Accounting and Financial Management, Honours, Co-op, 2023

Coursera - Online Courses

- Accounting Analytics - Wharton School of the University of Pennsylvania Apr 2020
- Data-driven Decision Making, Problem Solving with Excel - PwC Jun - Jul 2019

Interests

- Personal Investing and Finance, Photography