

SONIA BALANI

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Summary of Qualifications

- Outstanding teamwork and communication skills demonstrated by leading a team at UWDECA case competitions
- Strong interest in financial markets as shown through SQL side project and joining the Student Investment Fund
- Technical proficiency in MS Office (Word, Excel, PowerPoint), SQL, Tableau, R, Python, HTML and CSS

Work Experience

PricewaterhouseCoopers LLP (PwC)

Assurance Associate (Co-op) Jan – Apr 2021

- Prepared over 200 working papers during audits for Real Estate, Mining, Technology and NPO clients
- Performed tests of detail, tests of control and substantive analytical procedures on accounts such as revenue, accounts receivable, accounts payable, PPE and cash by leveraging time management and problem-solving skills
- Maintained excellent relationships with clients through communicating effectively to perform audit procedures

Office of the Superintendent of Financial Institutions (OSFI)

Financial Accounting Intern (Co-op) Jan – Apr 2020

- Prepared multiple quarterly Life Insurance Capital Adequacy Testing (LICAT) summary reports by analyzing over 50 company datasets to highlight market trends and key drivers behind capital changes for senior management
- 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

VIBHA Technologies Inc.

Data Analyst Intern Jul – Aug 2019

- Leveraged Microsoft Excel and SQL skills to load raw client and company storage metrics data into SQL tables to project the next 5 years of external storage growth and costs per client
- Presented a consolidated solution which projected a 15% reduction in costs by transferring all data into AWS S3

Extracurricular Experience

School of Accounting and Finance, Student Investment Fund (SIF)

Senior Analyst Sept 2020 - Present

- Collaborated with a team of students to manage a C\$350,000 portfolio of Canadian and U.S. equities
- Presented an update on holdings in portfolio through utilizing financial modelling and financial analysis skills

University of Waterloo DECA (UWDECA)

Team Member Sept 2018 – Apr 2019

- Developed strong interpersonal skills while working with a team during in-house and invitational case competitions

Projects

Tweeting Drives the Stock Market ft. Elon Musk and Tesla – SQL Project

soniabalani.github.io/twitterproject.html Jul 2019

- Utilized SQL queries and a weighted sum formula to rank the top 20 days where the intersection of Tesla's highest stock price movements and most activity with Elon Musk's 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

Candidate for Bachelor of Accounting and Financial Management, Honours, Co-op, 2023 Sept 2018 - Present

Coursera - Online Courses

• Data-driven Decision Making, Problem Solving with Excel – PwC Jun - Jul 2019

Interests

- Personal Investing and Finance, Photography