

SONIA BALANI

(647) 449-7539 | sonia.balani@uwaterloo.ca | soniabalani.github.io

Summary of Qualifications

- Excellent teamwork and communication skills demonstrated by leading a team at UWDECA case competitions
- Outstanding analytical and problem-solving skills developed through IFRS 17 and LICAT projects at OSFI
- Strong interest in financial markets as shown by SQL side project and joining the Student Investment Fund
- Technical proficiency in MS Office Suite (Word, Excel, PowerPoint), VBA Macros, SQL, Python, R, Tableau

Work Experience

Financial Accounting Co-op Student

Jan – Apr 2020

Office of the Superintendent of Financial Institutions (OSFI)

- Prepared multiple quarterly Life Insurance Capital Adequacy Testing (LICAT) summary reports by analyzing over 70 different company datasets to highlight market trends and key drivers behind capital changes
- 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
- Designed a condensed Statement of Profit and Loss by analyzing IAS 1 and 34 for IFRS 17 progress reports

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 new data metrics
- Presented a consolidated solution which projected a 15% to 20% reduction in costs by transferring all client and company data into AWS cloud storage

Extracurricular Experience

Junior Analyst

Sept – Dec 2020

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

- Collaborated with a team of students to manage a C\$350,000 portfolio of Canadian and U.S. equities
- Conducted research on stocks in consumer sector and presented an update on holdings in portfolio

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

- 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

Sept 2018 - Present

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

Coursera - Online Courses

- Data-driven Decision Making, Problem Solving with Excel - PwC

Jun - Jul 2019

Interests

- Personal Investing and Finance, Photography