

Suraj Udasi

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SKILLS

Financial Planning & Analysis (FP&A)
Budgeting, Forecasting, and Reporting

Financial Modelling & Valuation, BI
Corporate Finance & Accounting

Mergers & Acquisition, Fundraising
Advanced Excel, SQL, R, Tableau

WORK EXPERIENCE

PDS Limited

Mumbai, India

Financial Analyst

August 2021 – July 2022

- Conducted pre-diligence analyses to save costs, reduce reliance on external research providers, and improve processes
- Analyzed ~10 acquisition targets by researching, building financial models, and tracking key operating ratios to resolve variances
- Performed data-driven analysis and modeling of financial statements of Sunny Up (UK Based licensing company), leading to a successful acquisition at a recommended valuation of ~\$1.2 million
- Created quarterly financial reports for the senior management (CEO, CFO, BoD) as part of the Business Enabling Team (BET) and effectively communicated the CEO's vision to stakeholders
- Developed frameworks for analyzing revenue and margins categorically and geographically across the top 10 business verticals
- Oversaw the PR team and revamped PDS's corporate website and LinkedIn page, resulting in ~8,400 new followers within 3 months, a 96% increase in page views, and an 86% increase in unique visitors
- Developed and led training programs for interns, providing mentorship focused on Advanced Excel and Executive Presentations
- **Awards:** PDS Extra Mile Reward, PDS Optimus Award

Foxtrot Beverages Private Limited (DBA Svami)

Mumbai, India

Business Strategist

January 2019 – July 2021

- Led financial planning & analysis for the progressive beverage startup alongside Svami's founders
- Assigned and controlled annual budgets, handled financial reporting, and ensured compliance while managing ad hoc projects
- Executed a \$2 million Pre-Series A funding round, quadrupling the valuation to \$8 million within 2 years
- Collaborated with Marketing, Sales, and Accounting verticals to seamlessly integrate insights and pivot to a B2C model, resulting in doubled sales through online channels
- Managed working capital by creating debtor aging reports, reducing net working capital days by ~60 days
- Surpassed revenue targets set by management, achieving revenues of \$500K, representing an annual growth of ~130%
- Spearheaded Investor Relations and represented Svami within the investor community, building the firm's value proposition

Future Group

Mumbai, India

Assistant Manager – Corporate Finance and Investor Relations

August 2015 – January 2019

- Created quarterly investor updates and management reports by compiling business and financial inputs, formulating strategies, and ensuring concise presentations to shareholders
- Coordinated the IPO filing with SEBI of the Group's supply chain arm (Issue size: \$93 million)
- Managed the preparation of financial models (P&L, BS, CFS) of 14 investee brands to reach a suitable valuation multiple on a relatively short deadline in a \$100 million fundraise for Future Lifestyle Fashions Limited
- Led a team of interns to analyze and evaluate the financial performances of peer companies, providing valuable business insights

PROJECT EXPERIENCE

The Global Case Competition at Harvard

Cambridge, Massachusetts

M&A Analyst

February 2023 – March 2023

- Outlined findings, recommendations, and implementation strategies in the sustainability & renewable energy sector
- Developed comprehensive financial analysis, including Peer Comps, DCF Valuation, and synergy assessment
- Created detailed M&A proposal evaluating market analysis, strategic fit, acquisition feasibility, and alternative investment options

EDUCATION

Hult International Business School

Cambridge, Massachusetts

Master of Science in Finance, Cumulative GPA: 3.75/4.00

Expected August 2023

Areas of Interest: Portfolio Management, Investments, Equity Research, Data Analytics, Communication & Collaboration

Awards: Dean's List, Recipient of the Future Leadership Scholarship and Entrepreneurial Impact Scholarship

London School of Economics and Political Science, University of London

Mumbai, India

Bachelor of Science in Accounting and Finance

August 2015

Areas of Interest: Financial and Management Accounting, Financial Management, Financial Reporting, Mathematics, Statistics

ADDITIONAL INFORMATION

Certifications: Descriptive statistics in R (Coursera); R for Finance (Datacamp), SQL (Datacamp)