Navya Sree Chanda

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Summary

Results-driven Finance & Investment Operations Professional with 6+ years of global experience spanning the USA and India in portfolio operations, syndicated loan management, financial analysis, and process automation. Proven expertise in trade settlements, reconciliation, regulatory compliance (SEC, FINRA, SOX (Basic)), and data-driven decision support for multi-billion-dollar portfolios. Skilled in leveraging Advanced Excel, SQL, Tableau, Power BI, and mitigate operational risk, and enhance reporting accuracy. Adept at stakeholder engagement, cross-functional collaboration, and strategic capital allocation in fast-paced investment banking and financial services environments.

Skills

- **Technical & Analytical Skills:** Advanced Excel (macros, pivot tables, VBA, financial modeling), SQL, Python, process automation, BI tools (Tableau, Power BI)
- **Loan & Investment Operations:** Syndicated/Bilateral Loan Documentation Processing, Trade Settlement, Reconciliation (cash, positions, corporate actions), Exception Resolution, Collateral Management, Corporate Actions Processing
- **Process Improvement & Risk Control:** Workflow Optimization, Operational Risk Management, Audit Control Procedures, Regulatory Reporting, Performance Metrics Tracking, Business Process Re-engineering
- **Regulatory & Compliance:** Regulatory Frameworks (SEC, FINRA, SOX (Basic)), Risk Mitigation Strategies, Compliance Auditing, Policy Adherence, Internal & External Audit Support
- **Financial & Banking Systems:** Loan Management Systems (LOMS), Investment Management Platforms, Trade Processing Systems, Reconciliation Tools, Reporting Dashboards, SWIFT Messaging
- **Stakeholder & Client Interaction:** Cross-functional Team Coordination, Client Relationship Management, Issue Resolution, Vendor Management, Cross-border Communication

Experience

Finance Analyst
Blackrock | USA | Jan 2025 - Current

- Led budget forecasting, financial planning, and scenario analysis for multi-billion-dollar portfolios, leveraging Advanced Excel, SQL, and Power BI to develop robust investment performance models that directly informed executive-level decisions.
- Managed trade settlements, cash flow reconciliations, and corporate action processing across equity, fixed income, and derivative instruments.
- Re-engineered regulatory and financial reporting workflows by introducing automation tools such as VBA macros and reducing monthly reporting cycles by over 25% while improving data accuracy.
- Designed and maintained interactive Tableau dashboards to track KPIs, portfolio performance, and operational efficiency, enabling real-time monitoring for investment teams.
- Partnered closely with treasury, compliance, and portfolio managers to resolve operational discrepancies, align capital allocation strategies, and deliver high-quality client reporting.

Investment Operations Analyst
The Citco Group Limited | INDIA | Nov 2021 - Jun 2023

- Oversaw trade lifecycle management, including execution, settlement, reconciliation, and collateral management for global investment accounts, achieving improved settlement accuracy and faster turnaround times.
- Developed custom performance dashboards in Excel, Tableau, and Power BI to provide leadership with granular insights into transaction volumes, operational KPIs, and performance trends.
- Ensured strict compliance with corporate, client, and regulatory standards, collaborating with internal audit teams to maintain 100% audit readiness and zero non-compliance findings.
- Enhanced operational efficiency by streamlining SOPs, implementing automated reporting scripts, and standardizing reconciliation processes, reducing manual workloads significantly.
- Built and maintained cross-border client relationships, addressing inquiries on complex transactions, asset valuations, and financial reporting requirements with professionalism and accuracy.

Syndicated Loan Operations Analyst
State Street | INDIA | Jun 2019 – Nov 2021

- Managed the end-to-end syndicated loan lifecycle, including documentation review, loan closings, cash postings, interest calculations, and payment processing, ensuring compliance with contractual agreements and international banking regulations.
- Conducted daily cash position reconciliations and implemented enhanced exception resolution strategies that reduced reconciliation discrepancies by 30%.
- Produced detailed loan performance reports and variance analyses using Advanced Excel and Power BI, equipping portfolio managers with actionable insights for decision-making.
- Championed process improvement initiatives, revising SOPs and introducing automation in loan reconciliation workflows, which significantly improved operational turnaround times.
- Served as a key liaison between lenders, borrowers, and internal stakeholders, facilitating efficient communication and issue resolution during complex loan transactions.

Financial Operations Analyst
ADP | INDIA | Aug 2018 – Jun 2019

- Prepared and reconciled monthly financial statements, P&L reports, and balance sheets while ensuring adherence to GAAP accounting standards and internal controls.
- Automated repetitive financial reporting tasks using Excel macros and SQL queries, improving both reporting speed and data accuracy while reducing manual dependency.
- Conducted budget variance analysis and supported audit preparation by compiling detailed financial documentation and evidence for review.
- Partnered with business and finance teams to align operational priorities, optimize budget allocations, and ensure all deliverables were completed within deadlines.
- Recommended and implemented process optimizations that improved overall reporting accuracy, reduced operational risks, and enhanced stakeholder satisfaction.

Education

Master of Science in Finance | May 2025
Clark University | USA

Master of Business Administration (MBA), Accounting and Finance | Apr 2021
Osmania University | INDIA

Bachelor of Arts in Commerce (Computers) | May 2018
Badruka College of Commerce and Arts | INDIA

Projects

Clark Endowment Fund – Portfolio Management & Investment Strategy

- Actively managed a diversified multi-asset portfolio (equities, fixed income, and alternatives) through data-driven investment decisions.
- Applied quantitative techniques to evaluate market trends, industry performance, and macroeconomic indicators for portfolio rebalancing.
- Assessed risk-adjusted returns using statistical models and conducted backtesting in Bloomberg against benchmarks (e.g., Fidelity Freedom 2030 Fund – FFFEX).
- Recommended high-value investment opportunities through combined fundamental and quantitative research, enhancing portfolio performance.

Valuation & Strategic Analysis – Amazon's Acquisition of Whole Foods

- Built a comprehensive valuation model to analyze Amazon's $13.7B acquisition of Whole Foods.
- Identified a $3.02B overvaluation based on intrinsic value analysis and premium paid.
- Assessed financial and operational synergies, projecting improvements in free cash flow, profitability, and customer base growth post-acquisition.
- Delivered strategic recommendations to improve capital allocation and shareholder value.

Foods Financial Statement Analysis – Macy's Inc. 10-K Review

- Performed in-depth analysis of Macy's financial statements (income statement, balance sheet, cash flow).
- Calculated and interpreted key ratios across profitability, liquidity, solvency, and activity metrics to evaluate corporate financial health.
- Identified operational inefficiencies and strategic improvement opportunities, presenting actionable insights to strengthen financial positioning.