# Megha Navya Burra

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## Professional Summary

Results-driven Financial Analyst with 5 years of experience in financial planning, analysis, forecasting, and financial modeling at leading global financial institutions (Bank of America and HSBC). Expertise in analyzing large, complex datasets to identify trends and develop actionable insights for business decision-making. Skilled in cross-functional collaboration and the use of advanced analytics tools like SQL, Excel (VBA, Macros), Power BI, and Tableau. Proven ability to drive revenue growth, optimize operations, and enhance financial reporting processes. Passionate about leveraging data to influence key business strategies and support financial forecasting and performance analysis.

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## Core Competencies

- Financial Analysis & Reporting
- Revenue Forecasting & Financial Modeling
- SQL & Data Extraction
- Variance Analysis & Scenario Planning
- Advanced Excel (Macros, Pivot Tables, Dashboards)
- Cross-Functional Collaboration
- KPI & Performance Metrics
- Power BI / Tableau for Data Visualization
- Financial Forecasting & Budgeting
- SaaS & Subscription Models
- Presentation Creation & Executive Communication

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## Professional Experience

### Financial Analyst – Bank of America (BofA)

*Oct 2023 – Present*

- Conducted in-depth financial analysis of retail and corporate banking portfolios, exceeding $2B, and developed actionable insights to optimize capital allocation and revenue growth.

- Created and maintained financial models for forecasting and variance analysis, improving forecast accuracy by 20% and ensuring alignment with company KPIs and business strategies.

- Delivered monthly financial presentations to senior management, summarizing performance against targets, highlighting opportunities for improvement, and supporting strategic decision-making.

- Cross-functional collaboration with business and finance teams to integrate financial insights into the development of business metrics like customer lifetime value and cost per acquisition.

- Automated recurring financial reporting processes using SQL, Excel macros, and Power BI, reducing report preparation time by 30% and improving data accuracy.

- Key Achievements:

  - Identified revenue-driving opportunities leading to $1.5M in annual cost savings through improved variance analysis.

  - Improved profitability analysis by integrating new forecasting models and strengthening financial reporting systems.

Financial Analyst – HSBC

*Mar 2021 – Jul 2023*

- Played a key role in financial forecasting for SME and corporate loan portfolios worth $500M, analyzing performance data to provide strategic insights on lending decisions and business opportunities.

- Developed and implemented financial models to support budgeting and forecasting cycles, ensuring accuracy within ±5% variance of actual results.

- Collaborated with cross-functional teams (including Treasury, Risk, and Operations) to provide insights on liquidity and interest rate risks, ensuring compliance with regulatory standards.

- Led the integration of SAP and other financial systems, ensuring that contract terms and financial performance metrics aligned with business goals and reporting standards.

- Conducted scenario analyses and provided actionable recommendations to improve financial performance, including cost reduction and revenue enhancement strategies.

- Key Achievements:

  - Designed a liquidity stress testing model, improving financial risk management practices across regional treasury teams.

o   Played an integral role in the S&P and lender due diligence processes, ensuring timely and accurate reporting of financial data.

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Education

Master of Science (M.S.) in Finance
University of Texas at Dallas, United States

Bachelor of Business Administration (BBA) in Finance
VIT-AP University, India

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Technical Skills

- Excel (Advanced): Macros, VBA, Pivot Tables, Dashboards

- SQL: Data extraction, automation, financial reporting

- Power BI / Tableau: Executive dashboards and analytics

- SAP/Oracle Finance: Enterprise financial management

- Bloomberg / Reuters / FactSet: Market research and financial data

- SiSense / CRM Systems: Data integration and reporting tools