FNU DOLSY

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SUMMARY

Financial Analyst with 4+ years of experience driving cost optimization, budget ownership, and profitability planning across investment banking and wealth management units. Conducted DCF and scenario models that helped drop a $7.8M rollout, flagged $2.7M in duplicate spend, and restructured pricing to improve margins by 140 bps. Skilled in Excel, SQL, Power BI, and financial systems like Oracle and SAP to build forecasting models, track KPIs, and run multi-division variance reviews. Partnered with FP&A, tech, and legal teams to turn raw data into decisions that shaped headcount, pricing, and spend strategy.

EXPERIENCE

Morgan Stanley Aug 2024 – Current

Financial Analyst - Investment Banking Cost Tracking & Forecasting Automation

- Built an **automated Excel-Python model** to consolidate monthly **OPEX data** across 7 **investment banking divisions**; reduced manual reconciliation time by **18 hours per month**
- Created **SQL scripts** to fetch **cost center–level data** from **Oracle DB**, segmented by **desk, region, and product type**; enabled cleaner **variance tracking** during monthly close
- Partnered with **Tech & Ops teams** to migrate legacy cost tracking to **Power BI**, implementing **DAX logic** to show real-time **budget vs. actuals**; improved forecast accuracy by **12% quarter-over-quarter**
- Designed a **scenario planning tool** in **Excel** using **macros** and dropdown inputs for the **CFO office**, enabling quick reforecasts under **headcount freeze** or **regulatory fine** scenarios
- Flagged **$2.7M in duplicative vendor charges** via trend analysis in **Excel PivotTables** and matched against **contract metadata in SharePoint**; helped **legal** renegotiate 3 service contracts

7FinCorp Group Feb 2020 - Nov 2022

Financial Planner/Analyst - Division-Level Budgeting and Profitability Review – Wealth Management

- Modelled a **3-year DCF model in Excel** to test whether expanding into two Tier-2 cities made financial sense; after factoring CAC, RM hiring, and likely churn, showed leadership why the **$7.8M plan** didn't clear our IRR hurdle
- Went deep into **five quarters of P&L** to see why advisory margins were slipping; traced it to bundled insurance dragging returns down by **2.1%**, which pushed product to redesign the package.
- Compared budgeted vs. actual spends across **14 cost centers** using Excel lookup logic; spotted a pattern of overspending in RM incentives and travel that had slipped past earlier reviews.
- Built a **monthly scorecard** tracking KPIs like net new assets, RM productivity, and fee recovery; gave managers a clearer view of which desks were underdelivering and where headcount needed adjusting
- Broke down **servicing cost per AUM** by client tier using GL data and service logs; found NRI segment was underpriced given time spent, which led to a pricing shift that raised margins by **140 bps.**
- Reworked our **budget templates** with FP&A to split out fixed vs. variable drivers; made mid-quarter reforecasts cleaner and cut turnaround by **30%.**

SKILLS

Financial Analysis & Planning: Financial Modeling, DCF Valuation, Budgeting, Forecasting, Sensitivity Analysis, Scenario Planning, Variance Analysis, Cost Accounting, Investment Analysis, Financial Reporting, Trend Analysis, KPI Tracking, Corporate Finance, Portfolio Management, Credit Risk Analysis

Data Analytics & Business Intelligence: SQL, Power BI, Tableau, BigQuery, Data Visualization, A/B Testing, Regression Analysis, Predictive Modeling, Statistical Analysis, KPI Dashboards, ETL, Data Mining

Financial Systems & Automation: SAP, Oracle EPM, Anaplan, Hyperion, Workday Adaptive Planning, BlackLine, Cognos Analytics, TM1, Essbase, PeopleSoft, Python, VBA, Macros, Query Optimization, Data Warehousing

EDUCATION

University Of Texas at Dallas **Dallas, TX**

MS, Business Analytics and Artificial Intelligence Dec - 2024

ICFAI Business School **INDIA**

Bachelor of Business Administration Jul - 2020