

Gagan Sai Kamasani Venkatareddy

Financial Analyst

Rocklin, CA | +1 (940) 641 6793 | reddygagan027@gmail.com | [LinkedIn](#)

SUMMARY

Financial Analyst with 4+ years of experience in delivering actionable insights through strategic planning, budgeting, and financial performance analysis. Skilled in leveraging Python, SQL, and SAS to process and interpret complex datasets, enabling data-backed decision-making. Well-versed in using Bloomberg Terminal, QuickBooks, Tableau, Power BI, and Alteryx to develop interactive dashboards and automate reporting workflows. Demonstrated success in constructing advanced financial models for IRR, NPV, ROI, and KPI tracking to support investment strategies and optimize operational outcomes. Experienced in portfolio risk management, credit evaluation, and structured finance analysis, with strong command of valuation methods like DCF, LBO, CCA, and precedent transaction analysis. Deep understanding of GAAP principles, compliance frameworks, and audit preparation, with a track record of improving reporting accuracy and efficiency using SSMS and advanced Excel techniques.

SKILLS

Methodologies: SDLC, Agile, Waterfall

Technical Proficiency: Python, R-Programming, SQL, SAS, Oracle, Advance Excel (Lookups, Macro, Pivot Table, VBA), MS Office, QuickBooks, Bloomberg Terminal, Tableau, Power BI, Tally, ERP Accounting, Alteryx, SSMS

Financial Modeling & Analysis: IRR, NPV, KPI Evaluation, Scenario Analysis

Financial Skills: Financial Risk, Portfolio Risk, Corporate Finance, Cash Flow, Derivatives, Fixed Income, Credit Analysis, Credit Risk Modeling, Structured Financing, Financial Reporting, Auditing, GAAP, Research Analysis, Financial Planning, Market Trend Awareness, Financial Accounting, Financial Statement Analysis, Model, Investment Analysis, Financial Risk Management, R-Studio, Pitch Deck, Pitchbook, Capital IQ

Valuation Techniques: Discounted Cash Flow (DCF), Comparable Company Analysis (CCA), Precedent Transactions Analysis (PTA), Leveraged Buyout Modeling (LBO)

Operating System: Windows, Linux, MacOS

EXPERIENCE

Financial Analyst

JP Morgan Chase

USA

Aug 2024 - Present

- Erected advanced financial projection models integrating scenario analysis to guide investment planning, capital allocation, and multi-year budgeting decisions.
- Assessed investment portfolios valued at over \$20M through in-depth financial ratio analysis, trend evaluation, and market benchmarking, implementing strategies that reduced risk exposure by 18%.
- Created and maintained interactive Power BI dashboards delivering on-demand financial performance metrics, accelerating leadership decision-making by 40%.
- Directed end-to-end ledger management, reconciliations, and journal entries in platforms like Zoho Books and FreshBooks, ensuring full GAAP compliance and minimizing closing discrepancies by 30%.
- Streamlined month-end and quarterly close cycles by implementing Excel-based automation solutions, enhancing reporting accuracy and significantly reducing processing time.

Financial Analyst

Mindtree

India

Aug 2020 - Jul 2023

- Led Agile-driven financial operations, fostering seamless coordination across finance, strategy, and operations teams, which accelerated reporting timelines and improved adaptability to shifting business priorities.
- Established Excel-based financial models integrating scenario analysis, variance tracking, and KPI measurement, enabling more precise budgeting and faster strategic adjustments.
- Built and deployed 15+ interactive Tableau dashboards to track liquidity, capital efficiency, and credit exposure, cutting manual reporting workload in half and expediting decision-making for C-suite executives.
- Updated data integration and transformation pipelines using SQL Server and Alteryx, reducing data preparation time by 40% and increasing the reliability of financial datasets across business units.
- Executed in-depth reviews of capital structure alternatives, debt optimization options, and financing models, driving informed recommendations to enhance return on invested capital.
- Designed valuation frameworks incorporating precedent transactions, market comparables, and earnings multiple analysis to pinpoint investment opportunities with projected ROI gains of up to 30%.
- Conducted advanced portfolio analysis of fixed-income securities and derivatives, optimizing allocation strategies and lowering interest rate risk by 15%.
- Directed end-to-end compliance assessments and audit processes, reinforcing reporting accuracy, regulatory adherence, and alignment with corporate governance standards.

EDUCATION

Master of Science in Computer Science

California State University

Apr 2025

Sacramento, CA

Bachelor of Science in Computer Science

Gitam University

Apr 2023

Vizag, India