

SURYAKANT OJHA

MBA | FINANCE

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PROFESSIONAL SUMMARY

Dynamic finance professional with an MBA degree from IILM University, specializing in financial analysis, investment management, and business development. Skilled in Financial Modelling, Power BI, and Excel, with a proven ability to analyse stock market trends, optimize portfolios, and drive revenue growth. Adept at delivering data-driven insights to enhance stakeholder decision-making.

EDUCATION

- MBA | FINANCE | IILM University, Gurugram 2023 – 2025
- CA FOUNDATION 2018
- B.COM (H) | Accounting & Finance | Sambalpur University 2017 – 2020

TECHNICAL SKILLS

Data Analysis & Visualization: SQL , Power BI, Tableau, MS Excel

Tools: Microsoft Word, Google Docs, JIRA, Power Point, Google Sheets, Tally Prime

Domains: Financial Modelling, Accounting & Financial Reporting, Investment & Client Management, Capital Market, Equity Research, Financial Analysis

INTERNSHIP & EXPERIENCE

FINANCIAL ANALYST | Fundsroom Investment Services

Apr 2024 – Jun 2024

- Conducted trend analysis on 15 companies, generating actionable investment signals that improved client decision-making.
- Developed 5+ financial models using MS Excel and Power BI, streamlining data-driven reporting and presentations.
- Achieved a 23% return on a client's portfolio by leveraging technical and fundamental analysis.
- Converted 18 DEMAT accounts in a month, exceeding conversion targets by 30% through strategic investment insights.

BUSINESS DEVELOPMENT ASSOCIATE | BYJU's

Mar 2022 – May 2022

- Contacted 200+ customers daily, driving a 15% increase in conversion rates through persuasive sales strategies.
- Secured the highest revenue of INR 1,73,000 within a 7-member team, outperforming peers by 40%.
- Delivered product presentations to 70+ customers, effectively addressing inquiries and influencing purchase decisions.

ACCOUNTANT | Agarwal & Associates

Oct 2020 – Feb 2022

- Prepared and analysed 5+ quarterly financial reports, optimizing financial insights for decision-making.
- Managed ₹1+ crore in financial transactions, ensuring accuracy in bookkeeping and invoicing using Tally Prime.
- Reconciled more than 100 bank statements, improving financial efficiency and ensuring compliance with reporting standards.

ACADEMIC PROJECTS

CAPSTONE PROJECT – FINANCIAL MODELLING

Nov 2024

MS Excel

- Performed a comprehensive five-year financial statement analysis, uncovering trends in profitability, liquidity, and solvency.
- Analyzed critical profitability metrics such as Gross Profit Margin (34.8% to 30.2%) and Net Profit Margin (18.6% to 16.4%), providing strategic insights into declining efficiency.
- Examined solvency risks by tracking an increase in the Debt-to-Equity Ratio from 0.22 to 12.02, highlighting escalating financial leverage and risk exposure.

INVESTMENT ANALYSIS & PORTFOLIO MANAGEMENT

Jun 2024

MS Excel, Power BI, Moneycontrol, Screener, Bloomberg`

- Identified high-performing stocks across multiple sectors and conducted in-depth financial analysis of the top 5, delivering actionable investment insights.
- Evaluated portfolio performance by calculating returns, risk, and required rate of return (ROR) using advanced Excel methodologies.
- Assessed and interpreted over 7 key financial ratios and indicators, enabling data-driven investment decisions.