

# NISHANT SRIVASTAVA

Risk & Data Analyst | Insurance & Financial Services

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## PROFILE SUMMARY

**Analytical Data Professional** with 1.5+ years of experience in **insurance and financial services**, leveraging data-driven insights to enhance operational efficiency and business growth. Proficient in **Advanced Excel, SQL and Power BI** for **data extraction, KPI analysis, and dashboard development**. Skilled in **trend analysis** and translating business requirements into **actionable insights** that support strategic decision-making.

## KEY SKILLS

- Data Analysis & Risk Monitoring:** Advanced Excel (Pivots, LOOKUPS), EDA, Insight Generation, MySQL
- Business Intelligence:** Power BI, Excel Dashboard, Tableau
- Soft Skills & Tools:** Analytical Thinking, Problem-Solving, Attention to Detail, Data Storytelling, Communication

## EXPERIENCE

### Mirae Asset Sharekhan

Sep 2024 – Sep 2025

Investment Relationship Manager

Lucknow, UP

- Analyzed portfolio data of **1K+ clients** managing **INR 10–12 Cr AUM** to monitor performance trends and identify investment risk exposure.
- Segmented customers portfolios to identify **55-60% dormant accounts**, and detect engagement patterns for targeted reactivation.
- Developed **Excel MIS reports** and **KPI dashboards** to monitor revenue trends, client behaviour, and portfolio performance.
- Conducted **trend analysis** to support data-driven decisions on portfolio management and cross-selling strategies.

### Policybazaar.com

Sep 2023 – Jun 2024

Relationship Manager

Lucknow, UP

- Analyzed inbound lead data (**300-350 monthly**) to identify customer profiles, policy demand trends, and conversion patterns.
- Improved lead prioritization and targeting strategies, achieving **2-3% conversion efficiency** through data-driven assessment of customer intent and policy suitability.
- Prepared structured Excel reports to scrutinize **revenue performance, conversion metrics, and sales productivity trends**.

## PROJECTS

### Retail Sales Performance Analysis | Excel | MySQL | Power BI

[GitHub](#)

- Designed and implemented a **relational database in SQL Server**, creating structured **fact** and **dimension** tables with **primary** and **foreign** key relationships.
- Connected Power BI to **SQL Server** for live data extraction and performed analysis on **10k+ transaction records**.
- Spotted that the **top 20% of customers shared ~65% of total revenue** and detected a **10.7% monthly sales decline**, highlighting revenue concentration and trend shifts.
- Created dynamic Power BI dashboard by implementing **DAX-based KPIs and calculated measures** to monitor revenue trends and category-wise performance.

### Credit Risk & Delinquency Analysis | Excel | Python

[GitHub](#)

- Conducted exploratory data analysis on a financial dataset of 500+ customers to identify **key indicators of credit delinquency risk**.
- Analyzed variables such as **credit utilization, missed payments, income, and debt-to-income ratio** to detect high-risk profiles.
- Proposed a **predictive modeling framework to estimate delinquency probability** using classification techniques.
- Designed a **data-driven collections** strategy to prioritize **high-risk customers and improve recovery outcomes**.

## EDUCATION

### Dr. RML Awadh University, Ayodhya

2020 – 2022

Master of Commerce

### Dr. RML Awadh University, Ayodhya

2017 – 2020

Bachelor of Commerce

## TRAINING AND CERTIFICATIONS

### IIMSkills

2025 – 2026

Data Analytics Master Course 2.0

[Certificate Link](#)

### NISM Certification

2024–2027

NISM - VA Mutual Fund Distributors Exam

[Certificate Link](#)