

# NAGUL MEERA SHAIK

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## SUMMARY

Senior Financial Analyst with around 4 years of experience in FP&A, financial reporting, and data analytics within banking and financial services and customer analytics domains. Experienced in variance analysis, budgeting and forecasting, and P&L analysis, using SQL, Python, and advanced Excel to deliver actionable financial insights. Skilled in Power BI and Tableau for KPI reporting, with strong capabilities in data validation, stakeholder management, and scalable financial reporting.

## PROFESSIONAL EXPERIENCE

### JPMorgan Chase & Co. | Financial Analyst | USA

Jan 2026 – Present

- Optimized expense structures across 5 business units by identifying cost leakages through transaction-level analysis using SQL, improving cost visibility for finance leadership.
- Elevated forecast accuracy by 14% by diagnosing budget vs actual variances across quarterly cycles using advanced Excel modeling, strengthening financial planning reliability.
- Developed 4 executive KPI dashboards integrating cross-functional datasets via Power BI, reducing reporting turnaround time by 30% for senior stakeholders.
- Streamlined data validation workflows for 2M+ records within AWS S3 environments, enhancing data integrity and minimizing reconciliation discrepancies.

### Epsilon | Business Analyst / Financial Analyst | USA

Nov 2024 – Jan 2026

- Improved campaign performance visibility across 8 client portfolios by analyzing revenue trends using Tableau, supporting data-driven budget allocation.
- Translated 25+ business requirements into structured reporting solutions through JIRA documentation, accelerating analytics delivery timelines.
- Identified 11% overspend patterns across 10+ campaigns by conducting variance analysis using advanced Excel functions, enabling cost optimization decisions.
- Consolidated financial datasets from 3 data sources by implementing data validation checks using Python, improving reporting consistency.
- Designed interactive dashboards enabling real-time KPI monitoring, enhancing stakeholder visibility into performance metrics.

### KPMG | Financial Analyst

Jul 2020 – Aug 2022 | India

- Executed financial reporting across 6 client engagements handling large-scale datasets using SQL Server, ensuring alignment with reporting standards.
- Diagnosed budget and forecast variances across 4 business units, supporting corrective financial actions through structured variance investigations.
- Enhanced data accuracy by 18% by validating financial inputs from multiple systems through data quality checks, improving reporting reliability.
- Formalized 3 financial workflows by documenting process controls and reporting procedures, strengthening audit readiness.
- Investigated discrepancies within high-volume transaction data by performing reconciliation analysis using Alteryx, reducing reporting inconsistencies.
- Generated monthly variance reports across 12 reporting cycles, tracking revenue and cost movements to support performance analysis.
- Coordinated cross-functional data collection across 4 teams, enabling timely financial consolidation and reporting delivery.

## TECHNICAL SKILLS

- **Financial Analysis:** Financial Modeling, Budgeting & Forecasting, Variance Analysis, Revenue & Cost Analysis, Financial Reporting, P&L Analysis, Scenario Analysis
- **Business Analysis:** Requirements Gathering, BRD/FRD, User Stories & Acceptance Criteria, Stakeholder Management, Gap Analysis, Process Mapping (AS-IS / TO-BE), UAT, Agile/Scrum
- **Data & Technical Skills:** SQL, Python (Pandas, NumPy), Advanced Excel (Power Query, PivotTables, VLOOKUP, XLOOKUP), Data Cleaning, Data Validation
- **Data Visualization & Reporting:** Power BI, Tableau, Dashboard Development, KPI Reporting, Reporting Automation
- **Tools & Platforms:** JIRA, Confluence, Snowflake, AWS S3, SQL Server, Alteryx, PowerPoint
- **Accounting & Compliance:** Financial Statements, GAAP
- **Domain Expertise:** Banking & Financial Services, Risk & Compliance, Payments & Transactions, Customer Analytics, Regulatory Reporting
- **AI & Advanced Analytics:** Predictive Modeling, Time Series Forecasting (ARIMA, Prophet), Regression Analysis, Classification, XGBoost, Generative AI, Prompt Engineering
- **Data & Delivery Practices:** SDLC, Waterfall, Data Governance, Data Quality Management

## EDUCATION

MS in Data Science | Pace University | New York

Sep 2022 – Apr 2024

## CERTIFICATIONS

- Analyzing and Visualizing Data with Microsoft Power BI
- Tableau Desktop Certified Professional

## PROJECTS

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### Cloud Finance Data Pipeline & Warehouse

- Architected cloud-based **ETL** pipeline integrating **ERP** and transaction data using **AWS Glue**, enabling automated **financial data ingestion** into **Snowflake** for reporting.
- Standardized **financial datasets** using **dbt** transformations and centralized storage in **Amazon S3**, ensuring **data accuracy** and traceability across **50+ financial metrics**.
- Delivered **Power BI** dashboards connected to Snowflake, **reducing monthly reporting cycle time by 70%** and improving **stakeholder visibility**.

### AI-Driven Financial Forecasting & Dashboard

- Developed **forecasting models** using **Python (ARIMA, Prophet)** to analyze **revenue** and **expense trends**, improving **planning** reliability.
- Built Power BI dashboards **highlighting forecast vs actual performance**, enabling faster identification of **budget variances**.
- Automated forecast update workflows using **AWS Lambda**, ensuring near **real-time financial projections for decision-making**.

### Real-Time Transaction Monitoring & Risk Analytics

- Designed streaming data pipeline using **Apache Kafka** to process **high-volume transaction data**, enabling near real-time **financial monitoring**.
- Integrated live and historical datasets using **Snowflake**, improving contextual analysis for anomaly detection.
- Implemented automated alerting systems to **flag irregular financial activities**, reducing manual monitoring and **improving response time**.