

# Sathish Mekarathi

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## SUMMARY

Results-driven Financial & Data Analyst with 5+ years of progressive experience across financial services, healthcare, and enterprise analytics. Expertise in Financial Analysis, Forecasting, Budgeting, KPI Reporting, SQL, Python, Excel, Power BI, and Tableau. Proven track records improve reporting accuracy, optimizing business processes, and delivering measurable revenue and efficiency impact. Strong background in financial modeling, variance analysis, and data-driven decision support.

## EDUCATION

**DePaul University | Jan 2023 – Nov 2024 | Chicago, IL**

Master of Science (MS) in Information Systems, GPA: 3.6 /4 (Mathematics, Statistics).

Strong communication skills with a proven ability to collaborate effectively across cross-functional teams

## SKILLS

**Financial Analysis & Reporting** - Financial Modeling • Forecasting • Budgeting • Variance Analysis • P&L Analysis • Profitability Analysis • Scenario Modeling • KPI Reporting • Revenue Analysis • Business Margin Analysis

**Data Analytics & Programming**- SQL • Python (Pandas, NumPy, Matplotlib, Scikit-learn) Excel (Advanced Formulas, Pivot Tables, Power Query, Macros) • Statistical Analysis • Data Cleaning • Data Transformation

**Business Intelligence & Visualization**- Power BI • Tableau • Dashboard Development • Data Visualization • KPI Automation • Executive Reporting

**AI / Machine Learning / Advanced Analytics**- Machine Learning (Regression, Classification, Clustering) • Predictive Modeling • Time Series Forecasting • Model Evaluation & Validation • Feature Engineering • Natural Language Processing (NLP) • Large Language Models (LLMs) • Prompt Engineering • AI-driven Data Analysis • Generative AI Applications

**Databases & Systems**- MySQL • PostgreSQL • Salesforce CRM • ETL Concepts • Data Warehousing Fundamentals

## PROFESSIONAL EXPERIENCE

**Financial Analyst | Morgan Stanley | United States | Dec 2024 – Present**

- Developed dynamic revenue forecasting models using Excel and SQL, improving forecast accuracy by 18% and supporting \$120M+ pipeline visibility.
- Built executive-level KPI dashboards in Power BI tracking revenue, margin, deal velocity, and win rates; reduced manual reporting time by 35%.
- Conducted variance analysis on monthly P&L and business margin reports, identifying cost optimization opportunities that reduced operational expenses by \$750K annually.
- Automated weekly sales performance reports using Python and SQL queries, saving 12+ hours per week in manual effort.
- Led pipeline risk analysis and deal inspection reviews, increasing forecast reliability and reducing revenue leakage by 10%.
- Performed scenario-based financial modeling to support strategic planning and capital allocation decisions.
- Partnered with Reops and Finance leadership to improve CRM data integrity, increasing reporting accuracy by 22%.

**Data-Business Analyst | Tata Consultancy Services (TCS) | Hyderabad, TS | Jan 2022 – Jan 2023**

- Designed and maintained Tableau dashboards tracking sales KPIs, territory performance, and pipeline health, improving leadership visibility by 40%.
- Performed sales analytics and revenue trend analysis using SQL and Excel, driving a 12% improvement in quarterly sales performance.
- Built predictive forecasting models using historical sales data, increasing forecast precision by 15%.
- Conducted Whitespace and account penetration analysis, contributing to \$2.3M in new business opportunities.
- Automated quarterly business review (QBR) reports using Power BI and Power Query, reducing reporting turnaround time by 30%.
- Analyzed closed-lost trends and customer churn metrics, helping reduce churn rate by 8%.
- Collaborated with cross-functional teams to standardize KPI reporting frameworks, ensuring consistent performance measurement across regions.

**Healthcare Data Analyst | Aurobindo Pharma | Hyderabad | Oct 2018 – Dec 2021**

- Analyzed healthcare operational and financial data to optimize supply chain and procurement costs, achieving 14% cost reduction.
- Developed SQL-based reporting solutions to monitor hospital inventory, reducing stock discrepancies by 25%.
- Built healthcare analytics dashboards in Power BI tracking patient data, treatment costs, and compliance KPIs.
- Conducted variance and trend analysis on capital expenditure budgets exceeding \$50M.
- Automated data validation and reconciliation processes, improving financial reporting accuracy by 20%.
- Supported audit and compliance reporting initiatives, reducing audit query resolution time by 35%.
- Performed predictive analysis on demand forecasting, improving procurement planning efficiency by 18%.

## PROJECTS

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### Finance Analytics – Profitability & Forecasting Model

- Built 3-statement financial models with scenario and sensitivity analysis using Excel.
- Developed discounted cash flow (DCF) valuation models and profitability dashboards in Power BI.
- Improved forecast simulation efficiency by 25% through automated assumptions modeling.

### Sales Analytics – Revenue & KPI Dashboard

- Analyzed 500K+ sales records using SQL and Python to identify seasonal revenue trends.
- Designed interactive Tableau dashboards tracking CAC, LTV, conversion rates, and revenue growth.
- Identified pricing optimization opportunities that improved simulated profit margins by 9%.

### Healthcare Data Analytics – Patient & Cost Analysis

- Conducted exploratory data analysis (EDA) on patient datasets using Python (Pandas, NumPy).
- Built predictive models to forecast patient readmission risks with 82% accuracy.
- Developed KPI dashboards measuring treatment cost efficiency and operational utilization.

## Proficiencies

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- Strong attention to detail, resilience under pressure, and continuous improvement in mindset
- Comfortable working with ambiguity and scaling operational processes

## Certificates

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- HIPPA
- PL 300 (Power BI certified)
- SQL
- Data Analytics