

# Nandita Rana

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## PROFESSIONAL SUMMARY

Finance graduate with hands-on experience in compliance, risk monitoring, and financial analysis. Proven track record in reducing non-compliance risk, credit and portfolio analysis, and regulatory reporting. Skilled in Excel, Bloomberg, and data visualization with strong attention to detail and judgment under pressure.

## EDUCATION

University of the Pacific, Eberhardt School of Business | Stockton, CA

Master of Science, Finance

May 2025

Acropolis Institute of Management Studies & Research | India

Bachelor's in business administration

July 2022

## WORK EXPERIENCE

### Research Analyst

July 2025 - Present

SCAI, Arizona State University

- Cleaned and modeled large datasets in Excel, creating KPI frameworks and reproducible analysis, with documented methods for reuse and delivered concise readouts to faculty (clear, source-backed charts).
- Prepared concise reports and presentations, transforming complex data into actionable insights for faculty and stakeholders.

### Financial Analyst

Sep 2024 - Dec 2024

Dreyfuss Family Fixed Income Funds, Eberhardt School of Business

- Managed a \$500K fixed-income portfolio, optimizing asset allocation and performance through yield and duration strategies.
- Evaluated ETFs by analyzing performance, credit exposure, and macro trends, presenting findings in research reports.
- Presented detailed fund reports including compliance with investment policy, risk controls, and regulatory-style reporting.

### Teaching Assistant

Sep 2024 - Dec 2024

Eberhardt School of Business

- Simplified financial concepts (risk, valuation, compliance frameworks) for 20+ students through tutoring and workshops.
- Evaluated 50+ assignments with accuracy and fairness, demonstrating attention to detail and consistency.

### Investor Service Executive

Dec 2022 - July 2023

Metropolitan Stock Exchange of India Limited, Indore, India

- Reduced non-compliance risk by 20% through review of 200+ monthly transactions, aligning with SEBI rules.
- Collaborated with compliance, legal, and ops teams to close gaps and improve audit readiness.
- Engaged SEBI to reduce compliance related inquiries by 30%, strengthening regulator trust.

### Equity Research Analyst - Interns

Sep 2021 - Sep 2022

Total3LLP, Utah

- Conducted financial statement and risk analysis for 80+ companies, identifying exposures in liquidity and leverage.
- Created valuation models and sector reports that improved accuracy of investment and compliance-style due diligence.

## PROJECTS

### FP&A Month-End Dashboard Simulation -Oak & Stone Partners

Jan 2025 - Feb 2025

- Designed a forecasting and variance analysis dashboard using Excel and Power BI.
- Created reports that flagged risks and improved financial control oversight.

### Emerging Market Bond ETF Analysis - JP Morgan EMB & VWOB ETF

Oct 2024 - Nov 2024

- Evaluated credit risk, yield, and exposure for EM bond ETFs using Bloomberg, recommending a 5% allocation to each and raising EM exposure from 7% to 10%.
- Produced reports and analysis that strengthened oversight of sovereign and corporate credit risk, supporting compliance and diversification goals.

### Financial Analysis - Netflix

March 2024 - April 2024

- Built a dynamic financial model with income statement, balance sheet, and cash flow forecasts.
- Delivered detailed reporting insights on key drivers enabling stronger financial performance monitoring and risk evaluation.

## SKILLS

- Compliance & Analysis:** SEBI, AML/KYC, Bonds and ETF Analysis, Credit Analysis.
- Software:** Excel, Google sheets, Bloomberg, Power BI.

## CERTIFICATIONS

- Bloomberg Market Concepts Certificate | Nov 2024
- Bloomberg ESG Certificate | Dec 2024
- SIE | June 2025