

# Sangeetha K.S

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*MBA Finance Graduate with 3 Years of Banking Experience | Transitioning into Operations or Finance Roles in Non-Banking Sector to leverage operational expertise and analytical acumen in an analyst role within corporate domain.*

## EDUCATION

- ICFAI Business School, Bangalore [Merit Scholar | Best Mentor] - MBA Finance and Analytics** **Feb 2022**
- Relevant Coursework: Financial Accounting, Financial Management, Security Analysis, Credit Management, Investment Banking, Lean Management and six sigma, Project Appraisal, Fin-tech, Financial Business Analytics
- Indian Institute of Management, Kozhikode - Human Resource Management and Analytics** **Apr 2023**
- Relevant Coursework: HR Practices, Benchmarking, Organizational behavior, HR Metrics, Workforce Planning, Induction & Culture Fit, Talent Analytics- Sourcing, Acquisition, Development, Engagement, Collaboration & Retention Analytics.
- Ethiraj College For Women, Chennai - B.Com General** **Mar 2020**

## TECHNICAL SKILLS

- Accounting Skills** : Budgeting, Cash Flow Management, Risk Analysis, Forecasting, Reconciliation, Reporting
- Analytics** : Tableau, Power BI, IBM SPSS, R, Python
- Tools** : Finacle, Tally ERP9, CRM, Salesforce
- Microsoft Office** : Word, PowerPoint, Access, Outlook, Teams
- Advanced Excel** : Pivot tables, LOOKUP, Macros VBA, Solver, Goal Seek, Conditional Formatting
- Financial Functions** : PMT, IPMT, NPV, IRR, FV, PV, NPER, PPMT, IPMT

## PROFESSIONAL EXPERIENCE

- Kotak Mahindra Bank, Hosur [Assistant Manager – Service Officer]** **Aug 2023 – Apr 2025**
- Performed **daily reconciliation** of all cash and transaction activities including inward/outward clearing, ensuring SLA compliance, trade settlements and resolution of discrepancies.
  - Managed **month-end closing activities**, preparing transaction reports, validating balances, and supporting audit reviews within strict timelines.
  - Investigated root causes of **breaks and operational issues**, implementing **permanent corrective actions** in line with internal controls.
  - Introduced **additional validation checks** to improve accuracy in transaction accounting and reduce exception rates.
  - Developed and regularly updated **process documentation** to ensure knowledge continuity and compliance.
  - Supported **team members' daily activities**, providing process guidance and assuming BAU responsibilities during their absence.
  - Participated in internal training, process enhancement discussions, and cross-team knowledge sharing initiatives.
  - Liaised with back-office and compliance teams to manage document control, **audit readiness**, and service escalations.
- ICICI Bank Wealth Management, Chennai [Deputy Manager II – Wealth Manager]** **3/22 -12/22**
- Coordinated end-to-end account servicing and operational execution for 400+ clients with an investment book of ₹40 Cr.
  - Ensured timely and accurate reconciliation of client investment activities, supporting regulatory compliance and audit preparation.
  - Collaborated with cross-functional teams including BLG, SME, and operations to ensure seamless account management and issue resolution.
  - Conducted performance reviews of client portfolios and implemented recommendations based on risk-return alignment.
- Aditya Birla Capital, Bangalore [Project Intern]** **2/21-5/21**
- Conducted in-depth research and analysis on a variety of mutual fund schemes, with a specific focus on offerings from Aditya Birla Capital, to understand product structure, historical performance, risk-return profiles, and market positioning.
  - Collaborated with Bank of Baroda as part of a product sales assignment, where I was responsible for promoting and selling Aditya Birla Capital's mutual fund and insurance products.

## PROJECTS

- **Portfolio Analytics using Python:** Analyzed stock performance and optimized portfolios using return, risk metrics, and correlation insights.
- **Hiring Forecast Dashboard (Power BI):** Created dashboards to visualize and forecast hiring trends for better HR planning.
- **Time Series Analysis (R):** Decomposed AirPassengers data to study trends, seasonality, and applied ARIMA forecasting.
- **Portfolio Return & Risk Estimation:** Calculated expected return and variance using stock weights and correlation matrix.

## CERTIFICATIONS

- **Advanced Excel certification** issued from Microsoft.
- Certification in **Tally ERP 9** from National Centre for Technical Education
- **Diploma in Financial and Capital Markets** from National Stock Exchange
- **AMFI Mutual Fund Distributor** Certification from the National Institute of Securities Market
- **Insurance Consultant** Certification from Insurance Regulatory and Development Authority of India
- Data Visualization with **Tableau** presented by Mentorskool
- **Code in Place** certification provided by Stanford University
- **Python for Finance** offered by Fore Vision Academy
- **Lean Six Sigma yellow belt** certification from Udemy
- Certification on **Business packs** offered by My Captain in a tie-up with IIM B
- **AML standards and KYC Norms** issued from Kotak Mahindra Bank Ltd
- **Financial Modelling Certification** issued from LinkedIn
- **Investment Advisor Module** issued from Finmark Trainers India Pvt Ltd
- **Securities ,Operations and Risk Management** issued from Finmark Trainers India Pvt Ltd

## ACHIEVEMENTS

- **Merit Scholarship** In MBA in ICFAI Business School
- First Place in **Business Hackathon Event** conducted in IBS
- **Yuva Kala Bharathi Award** for best in Academics and Drawing
- Best **Student Mentor** Award in ICFAI Business School
- Appreciation in **Financia Management** Fest in Brio'21 issued by Shri Ram College of Commerce
- Top contestant in **Analytics competition** in Management Fest issued by Loyola Institute Of Business Administration
- Won **RBH Trinity Contest** in Kotak Mahindra Bank Ltd in Dec 2023
- **Star performer** of the branch in Kotak Mahindra Bank in the month of July 2024
- **5 Star Rating** in Service Quality index and bank PSV audit issued by Regional Process and Quality Manager.

## VOLUNTEER

- Co-Ordinator of **Corporate Social Responsibility** club in IBS
- Co-Ordinator of **Data Analytics** Club in IBS
- Student coordinator of **All India Management Association** Bizlab Simulation Program in IBS
- Student volunteer in **Rotaract Club** in Ethiraj College for Women

## LANGUAGES

- English, Tamil, Hindi, Telugu, German