

SMITALI RAMESH SAKA

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CORE COMPETENCE

- Business Analysis
- Planning and Monitoring
- Elicitation and Collaboration
- Requirement Life cycle
- Management.
- Requirement Analysis and
- Design Definition.
- Strategy Analysis
- Solution Evaluation
- Stakeholder management
- Project management

TECHNICAL SKILLS

- Documentation Tools: MS Suite
- Prototyping & Wire frames Tools: Axure & Balsamiq
- Modelling Tools: MS Visio.
- Database: SQL
- Project Management tool:- JIRA
- Reporting Tools: Power BI, & Tableau.

DOMAIN KNOWLEDGE

- Finance
- CRM

EDUCATION

- Master of Commerce (M.Com)
University of Pune

CAREER OBJECTIVE

Strong ability to bridge the gap between business and technology teams, to enhance operational efficiency and strategic decision-making.

Backed by 8.2 years of experience in the finance domain, including 3 years as a Business Analyst.

PROFILE SUMMARY

Possesses in-depth knowledge of the **Software Development Life Cycle (SDLC)** across Waterfall and Agile methodologies, ensuring seamless project execution and delivery.

Proficient in **requirement gathering, BRD, FRD, SRS documentation, stakeholder communication, and end-to-end project lifecycle management** to ensure structured and efficient project execution.

Well-versed in **Agile Scrum**, with expertise in **user story creation, sprint planning, backlog management, and conducting Scrum ceremonies** while ensuring adherence to **Definition of Ready (DOR) and Definition of Done (DOD)**.

Equity Dealing Experience: Proficient in **equity trading, portfolio management and risk assessment**, with a deep understanding of financial instruments, trade execution, and compliance regulations.

WORK EXPERIENCE

NUVAMA INVESTMENT SOLUTIONS

JUN 24 - OCT 24

SENIOR WEALTH MANGER

Role - Functional Business Analyst

Requirement Gathering & Analysis: Collaborated with key stakeholders to elicit, analyse, and document business requirements, ensuring alignment with organisational goals and regulatory standards.

Process Optimisation: Evaluated and enhanced investment and trading processes, identifying inefficiencies and recommending improvements to optimise operations

Stakeholder Engagement: Acted as a bridge between product managers, investment teams, developers, and QA teams to ensure smooth project implementation.

Regulatory Compliance: Ensured that business processes and system implementations adhered to SEBI and other financial regulatory guidelines.

CERTIFICATION

- NISM-Series-XXI-A: Portfolio Management Services Distributors Certification
- NISM-Series-VIII: Equity Derivatives Certification
- Certified IT - Business Analyst IIBA [EEP]

SOFT SKILLS

- Analytical & Problem-Solving Skills
- Communication & Interpersonal Skills
- Adaptability & Leadership
- Teamwork
- Time Management

LANGUAGE

- ENGLISH
- HINDI
- MARATHI
- TELUGU

PURNARTHA INVESTMENT SOLUTIONS

AUG 23 - MAY 24

Wealth Manager

Project Name - Sales One (Agile Methodology)

Project Description - The Sales One Application is a comprehensive Customer Relationship Management (CRM) solution designed to streamline sales processes and enhance customer interactions.

Role - Parallel Business Analyst

Worked as a Parallel Business Analyst and Wealth Manager on the Sales One Application project. As a Parallel Business Analyst, I assisted in **requirement analysis & documentation (BRD, SRS)** **collaborated with stakeholders**, optimised sales processes, and ensured seamless CRM integration. My role involved **gathering business needs, creating process flows, supporting UAT**, and enhancing sales workflows. Simultaneously, as a Wealth Manager, I specialised in **investment advisory, portfolio management, client relationship management, and business development**.

SHAREKHAN LIMITED - BNP PARIBAS

SUPER INVESTOR

FEB 18 - MAY 23

Project 1 Name - InvesTiger Application (Waterfall Approach)

Project Description - Investiger is a comprehensive investment management platform designed to optimise portfolio management, enhance client advisory services.

Role - Parallel Business Analyst

Worked on Sharekhan’s InvesTiger Application to improve usability and optimise performance for retail clients. Conducted **business case analysis** to identify opportunities for automation and system enhancements. Developed **process flow diagrams and UML diagrams** to map trade execution. Created **wireframes and mockups for UI design**. Authored **BRD and FRD documents** outlining system requirements, functional enhancements. Designed **training materials and conducted workshops** for clients and internal teams to improve understanding and adoption of the application .

Project 2 Name - Sharekhan Application (Agile Methodology)

Project Description - The Sharekhan Application is a comprehensive trading and investment platform designed to provide seamless access to stock markets, mutual funds, and portfolio management tools. It enables retail and institutional investors to execute trades, analyze market trends, and optimize their investment strategies through an intuitive and data-driven interface.

Role - Parallel Business Analyst

Worked on Sharekhan's trading platforms (**Trade Tiger and Sharekhan App**) to improve usability and optimise performance.

Collaborated with development teams to address issues such as order execution delays, incorrect portfolio summaries, and system crashes during peak hours.

Gathered and analysed detailed requirements for the trading and investment platform, creating comprehensive **documentation (BRD and SRS) including functional specifications, user stories, and process flow diagrams to guide the agile development process.**

I actively engaged with stakeholders from finance, IT, and end-user teams, facilitated **user acceptance testing (UAT)**, and ensured seamless integration of real-time market data and automated trading functionalities. Additionally, I focused on continuous process improvement, and regulatory compliance, all of which contributed to a highly efficient and user-centric platform.

GUNWANI & KOLAPKAR CA

JAN 2016 - DEC 2017

AUDIT ASSISTANT

- Performed gap analyses on organisational compliance practices, identifying areas for regulatory improvements
- Created business case documents, ensuring accuracy and alignment with industry standards.
- Conducted process audits and provided actionable insights to enhance operational efficiency.
- Developed process flow diagrams to document and improve compliance workflows.