

SMITALI SAKA

BUSINESS ANALYST

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CORE COMPETENCE

- Business Analysis
- Planning and Monitoring
- Elicitation and Collaboration
- Requirement Life Cycle Management
- 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

CERTIFICATION

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

SOFT SKILLS

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

LANGUAGE

- English
- Hindi
- Marathi
- Telugu

CAREER OBJECTIVE

Results-driven professional with 8.2 years of experience in finance, including 3 years as a Business Analyst, adept at bridging the gap between business and technology to drive operational efficiency and strategic decision-making.

PROFILE SUMMARY

- Strong understanding of **SDLC**, proficient in **Waterfall and Agile methodologies** for efficient project execution.
- Skilled in **requirement gathering, BRD, FRD, SRS documentation, stakeholder communication, RACI matrix** and end-to-end project management.
- Expertise in Agile Scrum, including **user story creation, sprint planning, backlog management, and Scrum ceremonies (DOR & DOD compliance)**.
- Experienced in **equity trading, portfolio management, and risk assessment** with knowledge of **financial instruments, trade execution, and compliance regulations**.

WORK EXPERIENCE

NUVAMA INVESTMENT SOLUTIONS

JUN 2024 - OCT 2024

SENIOR WEALTH MANGER

Role and Responsibilities:

- **Requirement Gathering & Analysis:** Collaborated with stakeholders to elicit, analyse, and document business requirements, ensuring alignment with organisational goals and wealth management standards.
- **Process Optimisation:** Evaluated and enhanced investment, portfolio management, and trading processes, identifying inefficiencies and recommending improvements for optimised financial operations.
- **Stakeholder Engagement:** Acted as a liaison between product managers, investment advisors, wealth managers, developers, and QA teams for seamless project execution.
- **Regulatory Compliance:** Ensured adherence to SEBI and other financial regulatory guidelines in investment strategies, risk management, and wealth advisory processes.

PURNARTHA INVESTMENT SOLUTIONS

AUG 2023 - MAY 2024

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 - Business Analyst

Responsibilities:

- Interacted with the stakeholders and **gathered requirements** by using various **elicitation techniques**.
- Created **user stories** with appropriate acceptance criteria with the assistance of the Product Owner.
- **Prioritized and validated** the requirements using **Moscow and FURPS** technique, added user stories to **sprint backlog** based on prioritization order.
- Collaborated with Product Owner and Scrum Master for **BV and CP** and assisted the Product Owner for the creation of **DOR and DOD** checklist.
- **Generated Sprint, Product Burn down/Burn up charts** to track the project progress.
- Participated in product planning and **UAT** to successfully deliver each sprint component.
- As a Wealth Manager, I specialised in **investment advisory**, portfolio management, client relationship management and **business development**.

SUPER INVESTOR**Project 1 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 - Business Analyst**Responsibilities:**

- Trading Platform Optimization: Enhanced usability and performance of Trade Tiger & Sharekhan App, addressing order execution delays, incorrect portfolio summaries, and system crashes.
- Equity Dealing Expertise: Hands-on experience in **equity trading, portfolio management, risk assessment, and regulatory compliance** with a deep understanding of financial instruments and trade execution.
- Requirement Gathering & Documentation: Conducted detailed requirement analysis using **elicitation techniques, documented BRD, SRS, user stories, and process flow diagrams** to guide Agile development.
- **Agile & Sprint Management**: Created and prioritized user stories in JIRA, utilized **MoSCoW & FURPS techniques**, and contributed to sprint planning, backlog grooming, and Scrum ceremonies.
- **Stakeholder & Product Collaboration**: Worked closely with finance, IT, and end-users, facilitated UAT, and ensured seamless integration of real-time market data and automated trading.
- Process Improvement & Compliance: Focused on regulatory adherence, continuous process optimization to enhance trading efficiency and user experience.
- Scrum Metrics & Project Tracking: Generated **Sprint/Product Burn-down & Burn-up charts** to monitor progress and ensure timely delivery of sprint components.

Project 2 Name - InvesTiger Application (Waterfall Approach)

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

Role - Business Analyst**Responsibilities:**

- InvesTiger Application Enhancement: Improved usability and optimized performance for retail clients.
- Business Case Analysis: Identified automation and system enhancement opportunities.
- Process & Visual Modeling: Developed **process flow diagrams, UML diagrams, wireframes, and mockups using MS Visio, Balsamiq, and Axure**.
- Requirement Documentation: Authored **BRD, FRD, and SRS**, ensuring seamless translation of business needs into technical requirements.
- **Stakeholder Collaboration**: Conducted **enterprise analysis, stakeholder analysis**, and prepared a **RACI matrix** under senior BA guidance.
- Traceability & Testing Support: Maintained **RTM**, assisted in test case scenario creation, and ensured successful **UAT execution**.
- Training & Workshops: Designed **training materials** and conducted **workshops** for clients and internal teams.

GUNWANI & KOLAPKAR CA

JAN 2016 - DEC 2017

AUDIT ASSISTANT**Responsibilities:**

- Financial Audits: Assist in **reviewing financial statements, verifying transactions, and ensuring compliance with accounting standards and regulations**.
- Internal Controls Evaluation: **Assess internal control systems, identify weaknesses, and suggest improvements for better financial governance**.
- Documentation & Reporting: **Maintain audit workpapers, prepare audit reports, and document findings for senior auditors and management review**.