

PRIYANSH SONI

Ujjain, Madhya Pradesh, India | +91 88271 03511 | priyanshsonis999@gmail.com | [LinkedIn](#) | [Portfolio](#)

PROFESSIONAL SUMMARY

Semi-Qualified CA (ICAI) with 3+ years across financial analysis, business modelling, and statutory audit. Skilled in building integrated P&L, Cash Flow, and Balance Sheet models from scratch; DCF and comparable company valuation; and commercial analysis including market sizing and competitive benchmarking. Currently working as an Investment Banking Analyst applying Advanced Microsoft Excel, financial forecasting, and deal simulation seeking to leverage strong analytical, financial modelling, and business advisory skills as an **Associate Consultant** within a leading corporate finance and transaction advisory practice.

EDUCATION

Semi-Qualified CA (CA Final — 3 Papers Exempt)

Institute of Chartered Accountants of India | 2025

Bachelor of Commerce (B.Com)

Vikram University, Ujjain, MP | 2020

TECHNICAL SKILLS

Advanced Excel Financial Modelling & Valuation, PivotTables, VLOOKUP, Scenario Analysis, Sensitivity Analysis

Python NLP (TF-IDF), Data Analytics, Backtesting, Portfolio Performance Dashboards (Streamlit)

Audit & Compliance Statutory Audit, Bank Audit (RBI Norms), Internal Controls, Regulatory Compliance

Languages English (Professional Proficiency) | Hindi (Native) | German (Basic)

CORE COMPETENCIES

Financial Analysis | Business Modelling | Financial Modelling | Integrated P&L / Cash Flow / Balance Sheet | DCF & Comparable Company Valuation | Scenario & Sensitivity Analysis | Market Sizing | Competitive Benchmarking | Business Cases & Business Plans | FP&A / Forecasting | Financial Statement Analysis | Credit & Risk Assessment | M&A Teasers & Pitch Books | Equity Research

CERTIFICATIONS

- Citi – Investment Banking Job Simulation
- Bank of America – Investment Banking Job Simulation
- EY FAAS – Financial Accounting Advisory Simulation
- Standard Chartered – Credit Analyst Simulation
- Advanced Excel: Financial Modelling & Valuation
- LBO Valuation
- Mergers & Acquisitions – M&A, Valuation & Deal Process
- Investment Banking Mastery
- Data Analytics with Excel PivotTables

KEY PROJECTS

M&A & IPO Advisory — End-to-End Deal Simulation

- Built integrated valuation model triangulating DCF, trading comps, and precedent transactions; prepared full CIM (business overview, financial snapshot, deal rationale) and IPO readiness assessment covering IFRS transition gaps and ESG compliance requirements.
- Developed business case analysis and investor communication strategy — demonstrating end-to-end business modelling, project documentation, and presentation skills.

Financial Modelling — 3–5 Listed Indian Companies

- Built 3-statement models (P&L, Balance Sheet, Cash Flow) from scratch with DCF, relative valuation, and scenario & sensitivity analysis; developed FP&A forecasting tools to stress-test revenue growth, margins, and capex under bear/base/bull cases.

Macro Research — India Regional Economic Convergence

- Authored 10-page structured research report; designed and executed commercial analysis (market sizing, competitive benchmarking) identifying infrastructure and manufacturing investment themes — delivered sector-level buy recommendations backed by public data.

PROFESSIONAL EXPERIENCE

Investment Banking Analyst

Apr 2025 – Present

Zetheta Algorithms Pvt. Ltd | Indore, India

- Prepared financial forecasting outputs and deal simulation deliverables (InvestTech project suite) — applying financial analysis and business modelling to generate structured BUY/SELL signals across 5–10 stocks.
- Designed commercial analysis workflows using NLP on 100+ articles; built Streamlit dashboard tracking portfolio performance and sentiment trends with full project documentation; ran backtests measuring risk-adjusted returns.

Equity Research Intern

Jul 2025 – Aug 2025

Finsckool | Mumbai, India

- Built integrated P&L, Balance Sheet, and Cash Flow model for Tata Motors from scratch with 3-year segment-level revenue projections; conducted financial analysis using DCF and EV/EBITDA comps with scenario and sensitivity analysis.
- Prepared structured investment report with buy/sell recommendation, key downside risks, and valuation summary — demonstrating strong analytical and presentation skills.

CA Article Assistant

Feb 2019 – Mar 2022

Shrimal Bansal & Co. | Ujjain, India

- Led audit engagements across 4 PSU banks (SBI, Union Bank, Central Bank, Bank of India) — scrutinised loan books, NPA classification, provisioning norms, and RBI compliance across a combined portfolio under ₹500 crore.
- Raised 10+ audit observations on credit risk and internal control weaknesses; documented findings in review reports and liaised with senior partners to fully explain issues raised.
- Managed 10–20 client engagements across banking, retail, and manufacturing; prepared financial statements, income tax returns, and compliance schedules for corporate and HNI clients.