

Sree Lakshmi Anuhya Donepudi

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SUMMARY

Investment-Focused finance graduate and CFA Research Challenge Regional Finalist with experience in Portfolio Construction, Equity Valuation. Strong grounding in DCF, Comps, CAPM, attribution analysis to translate fundamentals/ KPIs into defensible data decisions.

EDUCATION

University of Massachusetts, Boston – *MS Finance*, GPA: 3.61/4

Boston, Jan 2024 – Dec 2025

St. Francis College for Women, Hyderabad – *Bachelor of Commerce (Honors)* GPA: 9.3/10

India, Sep 2020 – April 2023

PROFESSIONAL EXPERIENCE

Financial Analytics

India, Nov 2021 – Dec 2023

Infloo Pvt. Ltd – Growth Finance and Business Analyst

- Devised financial forecasts for campaign revenues, payouts using historical trends and forecast accuracy by ~18%.
- Analyzed **unit economics, CAC, ROAS**, margin drivers to highlight high-ROI channels and improve return efficiency by **12%**.
- Streamlined analytical workflows through **automated Excel cost-tracking files** improving turnaround time by ~20%.

Financial Analyst Internship

India, April 2023 - June 2023

IRA BIOTECH Pvt. Ltd. - *Finance & Accounting Intern*

- Led diagnostic performance analytics, authored **executive-ready insights** that optimized allocation inefficiencies by ~15%.
- Operationalized market-signal forecasting** models, improving budget allocation efficiency by 15%, reducing OpEx by 10%.

Financial Analyst Internship – Summer Internship

India, May 2021 - Sept 2021

KrishWorld Infracon – Financial and Valuation Intern in Real-Estate

- Conducted project-level valuation and **cash flow analysis** for 5+ large-scale real estate investments, with a profitability by 15%.
- Prepared **performance dashboards**, sensitivity models for management review, with 10% cost savings & resource optimization.

SKILLS

Technical Skills: Advanced Excel (Pivot Tables, VLOOKUP, Macros) | Power BI | SQL | Tableau | FactSet | Bloomberg | MS Office.

Financial Analytical Skills: Risk-Adjusted Performance Measurement | Portfolio Construction | DCF, Comps | Scenario/ Sensitivity Analysis | Asset Allocation Monte Carlo Simulations | Credit Risk | Equity Research | Fixed-Income | KPI tracking | Return Attribution.

Certifications: Bloomberg Market Concepts | Bloomberg Finance Fundamentals | Financial Statement Analysis | Financial Modeling and | Options Trading Strategies Module (NCFM) | Discounted Cash Flow Modeling | Excel for Corporate Finance.

PROJECTS

Capstone Practicum Stock Pitch – United Parcel Service, Inc.

- Issued a **BUY** on UPS with a \$139.33 target (+43% upside), piping (7.8% WACC; 9.8x exit EBITDA), Comps (7.5x EV/EBITDA).
- Recast UPS as an AI-driven, platform logistics ecosystem, surfacing SaaS-style margin lift via ORION and Global Checkout.
- Anchored the thesis around automation, logistic intelligence, deglobalization, and supply-chain resilience tailwinds.

Comprehensive Analysis of Portfolio Strategies and Investment Returns

- Deployed \$1M portfolio across sectors over 28 trading days, limiting to -10% downside and a 4% return target amid volatility.
- Generated **5%** capital appreciation through KPI-driven monitoring, S&P 500 benchmarking to quantify initial outperformance.

Netflix's Proposed Risk Management Strategy Analysis

- Executed a **forward/futures/swap hedging program** to reduce foreign exchange risk exposures and lift risk-adjusted returns.
- Stress-tested via Monte Carlo (3% 1-year PD, 1.86 Distance-to-Default) and hedged 7% of FX exposure with ~5,457 puts.

Global Portfolio Investment Management – University Endowment Fund

- Engineered \$500K global equity portfolio (90% equities, 10% commodities), benchmarked performance against MSCI ACWI.
- Executed portfolio risk-return using CAPM, beta (0.93), correlation & attributions to identify drivers of active return (-17.14%).
- Evaluated performance evaluation **via** Sharpe Ratio, Information Ratio, and Jensen's Alpha, estimating ~8.65% expected return.

RESEARCH

Equity Research Analysis (CFA Institute Research Challenge 2025)

Boston, Nov 2024 - Feb 2025

University of Massachusetts Boston - HubSpot Inc. Equity Research Report

- Built a 5-year three-statement model with DCF, trading Comps and scenario/sensitivity analysis to value HubSpot Inc.
- Projected 22% revenue CAGR and \$7.69B revenue by 2029; Issuing a **BUY** with \$838.23 target price with an upside of (+19.26%).
- Orchestrated a comprehensive **Equity Research report** + Investor deck using Bloomberg, Factset and Tableau Dashboards.

EXTRACURRICULARS

Member, UMass Boston Investment Club (*Sept 2024 – Ongoing*). Volunteer, Boston Fintech Week (*Sept 2025*) | GEN-AI Connect.