



Bhavya Khanna, CFA

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Summary

Investment and strategy professional with 5+ years of expertise across public and private markets, \$500M portfolio value creation, and quantitative data analysis. Cross-functional leader at the intersection of finance, strategy, and AI automation. Experienced in leading teams of up to 10 members and collaborating with leadership teams, founders and professionals from US, UK and APAC.

Professional Experience

Manager, Financial Research (Venture Studio) | D.E. Shaw India | Gurugram

- Collaborated with Venture Studio Principals to lead growth opportunities across startups collectively valued at \$500M+.
- Led end-to-end diligence for investments worth \$75M, conducted market sizing analysis, industry reports, unit economics analysis and break-even calculations for startups; developed memos to support investments.
- Devised Power BI dashboards and financial models tracking \$20M+ in annualized revenue and 10+ KPIs for operational efficiency and financial performance. Reduced manual reporting efforts for startup leadership teams by 20 hours/month.
- Managed 5 analysts for Venture Studio strategy to support business requirements of startups, and trained junior employees.

Senior Analyst, Financial Research (Venture Studio) | D.E. Shaw India | Gurugram

- *Wisable* | *SMB M&A Advisory*: Facilitated \$100M+ in transaction value across 20+ U.S. SMB deals by evaluating 200+ qualified leads, building 40+ valuation models and CIMs to support M&A execution.
- *Allwhere* | *IT Equipment Marketplace*: Diagnosed \$500K leakage in annual revenue by identifying pricing inefficiencies across 1,000+ invoices, redesigning pricing mechanisms, and improving billing process efficiency by 50%.
- *Cove* | *Private Equity Roll-Up Platform*: Facilitated a \$100M+ private equity roll-up thesis by screening 100+ U.S. industries to identify suitable acquisition verticals through industry and financial analysis.
- *Weld Valuations* | *SMB Valuation Advisory*: Synthesized market research for a \$10M+ investment thesis to support business planning and growth projections. Reduced promotion cost estimates by 20% for GTM strategy.
- *Vitruvio* | *Insurance Accounting Services*: Improved contractor ramp-up time by 40% by overseeing training and operational workflows for a 4-person team. Developed employee cost models impacting hiring budget of \$200K.

Analyst/Associate, Financial Research (Equity Investment Analysis) | D.E. Shaw India | Hyderabad

- Led bids of \$500M annually through investment research for 30+ IPOs by developing valuation models and investment theses.
- Delivered 40+ Equity Capital Market reports annually for trading desks across the US, UK and APAC. Supported opportunity-cost assessment of 10+ monthly deals with allocation of ~\$300mn+.
- Appraised quarterly earnings of 5 U.S. banks. Developed financial models and initiated newsletters for 30+ senior leaders.
- Drove projects for senior management to increase capital market allocations by 10% and revamped broker selection frameworks.
- Authored 100+ market reports for \$1B+ macro strategy, analyzing developments across geographies and 20+ assets.
- Saved 80+ hours/month through Excel/Python/Bloomberg based automations and partnered with technology teams to build UIs.
- Spearheaded AI adoption for \$250K annual cost savings for 200+ researchers, covering 50%+ of daily research workflows.
- Managed recruitment drives to hire 10+ associates for financial research and mentored 6 interns for talent development.

Education

Chartered Financial Analyst (CFA) Charter holder – *CFA Institute, Virginia* | *USA*

Bachelor of Management Studies – *Delhi University, Deen Dayal Upadhyaya College* | *India*

Accomplishments and Awards

- Youngest manager in the Financial Research department at age 26, ranked among the top 5% in 11/11 appraisal cycles.
- 3rd Best Adjudicator at Law College Dehradun. Top 10% Adjudicator at IIT Delhi National Asian Parliamentary Debate.

License & Certifications

McKinsey Forward Program by McKinsey & Company

Financial Modeling by BSE (Bombay Stock Exchange) Institute

Co/Extra-curricular

- D.E. Shaw's CSR Club – Educated 100+ underprivileged children through 3 education drives across Delhi-NCR region.
- President of Debating Society (DDUC) for AY 2019-20 – Led contingents at 30+ National Asian Parliamentary Debates.
- Member of Enactus for AYs 2017-2019 – Raised INR 1L+ by selling jewelry manufactured by underprivileged communities.