

Vishal Bhagat

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Professional Summary

Analytical and results-oriented financial Analyst with 2+ years of experience in data analysis, financial reporting, and actionable insight generation, driving strategic business decisions. Proven ability in financial modeling, variance analysis, and process improvement. Proficient in Excel, SQL, Power BI and Tableau. Experience with SAP (clearing variances, invoice resolution). Skilled in partnering with cross-functional teams to improve financial performance.

Skills & Competencies

- Financial Planning & Analysis: Budgeting & Forecasting, Variance Analysis, Scenario Planning, and Business Case Development
 - Financial Modeling: Advanced Excel Modeling (DCF, Sensitivity Analysis), ROI Analysis, Pro Forma Development
 - ERP Systems & Financial Reporting: SAP (GR/IR Clearing, Invoice Resolution), and Financial Statement Analysis
 - Data Analysis & Visualization: Power BI, Tableau, SQL and KPI Reporting
 - Cost Optimization & Process Improvement: Supplier Spend Analysis, GP & Revenue Management, and Cost Reduction Strategies
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Professional Experience

Financial Analyst | Marriott International, Bethesda, MD | *May 2024 - Present*

- Led the analysis of daily, weekly, and monthly revenue reports using advanced Excel, enhancing forecast accuracy by 18%. Provided data-driven insights contributing to strategic planning and a 10% increase in overall revenue.
- Implemented pricing strategies, leading to a 12% increase in RevPAR, exceeding industry benchmarks.
- Developed and maintained interactive Power BI dashboards to visualize KPIs, empowering the finance department with actionable insights and improving forecast accuracy by 18%.

Co-Founder/Investment Strategist | NextGen Developers, Cary, NC | *Jan 2024 - Present*

- Directed comprehensive financial data analysis for a \$7.7 million land development project, proactively identifying market trends to inform key business decisions and ensure project viability. Developed detailed financial reports and forecasts.
- Successfully raised \$1.75 million from accredited investors, structuring a two-tier investment model offering returns of 16.50% - 25%.
- Managed project lifecycle, focusing on optimizing cash flow, overseeing land acquisition costs, and strategically positioning the project for an average home selling price of \$1.1 million through market analysis and competitive positioning.

Investment Analyst Intern | VRB Capital, Chicago, IL | *May 2023 - Aug 2023*

- Led advanced due diligence efforts for successful bids on distressed notes, acquiring assets at 40% of face value through financial analysis and risk assessment. Generated detailed reports and presented findings to senior management.
 - Managed the underwriting process for 10+ hotel properties valued at \$5M+ using advanced Excel modeling, evaluating financial statements and projections to support investment decisions. Analyzed key metrics (ADR, occupancy rates, RevPAR) to assess property performance and provide actionable insights.
 - Utilized DistressedPro to execute targeted marketing campaigns, reaching over 250 banks with non-accrual assets. Achieved a 15% response rate, identifying 37 potential investment opportunities. Generated reports on campaign performance.
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Education

University of North Carolina at Chapel Hill - *Kenan Flagler* | *Aug 2020 - May 2024*

B.A. in Economics and B.S. in Business; GPA 3.85

Relevant Course Work (Corporate Finance, Advanced Spreadsheet Modeling, Intermediate Macroeconomics, Intermediate Microeconomics, Real Estate Finance, Financial Accounting, Operations Management, Strategic Management at the Business Level)

Certifications

SIE (FINRA), VC Deal Sourcing Certification

Projects

EB-5 Impact Analysis and Financial Pro Forma Development for Hotel Expansion | Marriott International

- Developed a 5-year financial pro forma for a \$15 million hotel expansion project, incorporating EB-5 financing. Modeled revenue projections (occupancy, ADR, RevPAR), detailed expense budgeting, and sensitivity analysis.

GLC Financial Modeling | NextGen Developers

- Created financial models for \$1.7M land/site prep costs, forecasting 18% ROI. Implemented cost reductions, trimming expenses by 12% and increasing profitability by 15%. Prepared and presented reports on cost reduction initiatives.