

Sachin Thakkar

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I am a BI Developer and Analyst with hands-on experience delivering end-to-end reporting solutions using Power BI, SQL, and DAX. I have built data models using star schema design.

I enjoy collaborating with business units to understand reporting needs and am confident choosing the right reporting layer—Power BI, Excel, or both—depending on the use case.

I bring strong SQL and Excel VBA skills, enabling me to integrate modern BI with legacy systems when needed. I also have knowledge of Python and Azure Data Factory to build ETL processes where Power BI's M language is insufficient.

I hold a Microsoft Power BI Data Analyst Associate certification and have received repeat business from high-profile financial clients.

Core Tools: Power BI, DAX, Power Query (M), SQL, SQL Server, Oracle, Excel VBA, Microsoft Access, Streamlit, Azure Data Factory, Python, SSRS, TM1, Database Design, ETL

PROFESSIONAL EXPERIENCE

Lloyds Bank, Contractor

BI Developer / Analyst July 2024 – Apr 2025

- Built a Power BI dashboard to replace a manual Excel/PowerPoint pack used by the IPV (Independent Price Verification) team for call-out meetings. The project involved integrating multiple data sources, cleansing and transforming data, building a relational data model, and developing DAX measures—particularly using the CALCULATE function—for dynamic reporting.
- The new dashboard improved efficiency, reduced manual effort, and enabled drilldown capabilities for deeper analysis.
- Updated a daily PnL reporting tool built in Access, Excel VBA, and SQL Server. Modified the automated Outlook email output and introduced table indexing to improve performance.
- Replaced a manual reporting process with a bespoke Excel VBA tool to automate email distribution, consolidate spreadsheets dynamically, and improve transparency.

Career Break - Development, Apr 2023 – Jun 2024

- Completed Microsoft Certification: Power BI Data Analyst Associate, covering data loading, cleansing, star schema modelling, DAX measures, and Power BI visualization design.
- Attended a full-time 3-month bootcamp in Data Science using Python (Pandas, Matplotlib, Seaborn, Plotly). Built a Streamlit app to demonstrate a logistic regression model.
- Built a Python Streamlit demo application using CSV inputs to simulate a fund management system, including features to add/delete funds, chart holdings over time and an ETL process to SQLite.

Scotia Bank, Contractor

Developer Analyst, Mar 2022 – Mar 2023

- Supported a large-scale implementation of the “Loan IQ” system by updating Excel and Access-based reporting tools to accommodate new data feeds. This included cleansing inconsistent data and collaborating with business units to ensure completeness and consistency of incoming data.
- Modified the SQL Server data warehouse by adding new tables and writing supporting queries to enhance reporting capability.

Alpha Bank, Contractor

BI Developer / Analyst, Jul 2019 to Apr 2021

- Created and demoed a Power BI prototype for senior management to showcase its potential to modernize internal reporting—delivered without a formal specification.

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- Developed a SQL Server and Excel-based Risk Weighted Asset (RWA) reporting tool to track daily risk exposure and provide intra-month business visibility.
- Built a SQL Server database to support client risk rating reviews for the FCA, integrating data inputs and report logic.
- Contributed to the implementation of a new regulatory reporting system by mapping data sources to target schemas and updating SSIS packages.

ERS, Contractor

MI Analyst Developer, Oct 2017 to Oct 2018

- Tested Power BI dashboards against SQL Server staging data in a UAT environment, validating visualization accuracy and logic without a formal specification.
- Automated manual MI processes related to underwriting premiums using Excel VBA, and implemented control checks to improve data reliability—enabling the business to track the impact of policy changes on premium generation.
- Modified and enhanced SSRS reports used for broker claims listings.
- Used TM1 with Excel to extract MI data for internal analysis.

Liberty Syndicates, Contractor

Analyst Developer, Jun 2012 to Oct 2015 and 2016 to 2017 (returned for multiple engagements in 2016–2017)

- Designed and delivered a custom Access/Excel VBA reporting solution to support reconciliation and financial decision-making—enabling fund reallocation into higher-yield accounts.
- Built a relational database schema with referential integrity, primary/foreign keys, and complex queries to optimize data loading and reporting accuracy.
- Delivered the project iteratively without a formal specification, working directly with business users to gather requirements and validate data sources.
- Created an Excel VBA reporting tool to identify and monitor cash breaks, improving auditability and transparency.
- Produced technical documentation, a user guide, and completed a structured handover for operational use.

Credit Suisse, Contractor

Analyst Developer - Credit Risk Reporting, July 2010 to Mar 2012, July 2016 – Oct 2016

- Delivered a fully automated Excel VBA/Access reporting solution for Tenor Country Reporting, replacing a manual process and saving up to three days of effort. Managed the project end-to-end from requirements to go-live.
- Enhanced and automated the monthly Broker Dealer Report, supporting expected loss reporting by product class. Built a reconciliation tool to identify and validate large trade variances.
- Rebuilt and optimized a legacy Hedge Fund reporting tool, reducing processing time from a full day to under 30 minutes.
- Worked iteratively with business users to refine reporting requirements and document technical specifications.

Deutsche Bank, Contractor

Technical Business Analyst, Program Management Group, Jan 2009 to June 2010

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- Supported the migration of trading books from the legacy SCT risk system to the dbRAT risk and PnL platform, including baselining historic cash and funding balances.
- Built an Excel VBA reconciliation tool to identify PnL differences between SCT and dbRAT at both trading book and trade level.
- Investigated Present Value (PV) breaks for Swaps, Credit Default Swaps (CDS), and Bonds, including manual re-pricing using historical market data.

Prudential M&G (Fund Management), Contractor to Permanent

Developer – Fixed Income, Fixed Income, Nov 2004 – July 2008

- Worked directly with the Fixed Income team to deliver Excel/SQL Server-based reporting tools to support trading and operational workflows.
- Built a multi-user Excel/SQL Server solution for the ABS (Asset-Backed Securities) team to bulk upload deal data and associated metrics into a central database.
- Developed an Excel/SQL Server tool to route Derivative Futures Trades for settlement in fund-specific formats across multiple destinations.

EDUCATION AND CERTIFICATION

BSc (Hons), Mathematics with Business

University of Surrey, Guildford

IMC – Investment Management Certified

INTERESTS AND ACHIEVEMENTS

I am a keen squash player and have improved my public speaking skills by doing stand-up comedy course(s) with several showcase performances. I have done improvised comedy which has helped my teamwork skills and have done and overcome physical challenges such as the three peaks challenge and the Camino de Santiago.