

Kavit Mehta

Madison, WI (open to relocation)

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Reporting Analyst with 3+ years of experience supporting buy-side clients in portfolio reporting, performance analysis, and risk assessment across multi-asset portfolios. Experienced in handling escalations, serving as a point on trade activity, booking logic, credit disputes, and reporting exceptions. Working knowledge of regulatory reporting controls supporting major U.S. requirements, including LOPR, 13F, and 13G. Proven track record of OMS and PMS automation, training junior analysts, and building trusted relationships with clients, vendors, developers, compliance, and other stakeholders.

Professional Experience

AI Engineer | MS Information Capstone

Sep 2025 - Dec 2025

- Automated a statistical process-capability analysis into an AI decision-support tool, cutting decision turnaround from 2.5 hours to 20 minutes.
- Deployed an Azure AI solution against strict evaluation metrics, utilizing tool calling (MCP) to standardize analysis and RAG to enforce governance alongside human-in-the-loop oversight.

AI Engineer | MSA Professional Services Capstone

Sep 2025 - Dec 2025

- Engineered agent-run ETL pipelines in Fabric to process large ERP datasets for documentation and reporting, saving months of manual effort.
- Integrated Copilot Studio agents over SQL warehouses so business teams could query big data in natural language.

Senior Financial Analyst | Enfusion

Jul 2021 - Jul 2024

- Reduced regulatory risk by automating post-trade reporting, in collaboration with Compliance, to flag allocation exceptions using live PMS data.
- Improved electronic trade monitoring by designing CI/CD controls to flag short-sale exceptions, potential wash trades, and CFTC reporting.
- Cut client operations waste by 20%+ by automating trade, position, and cash reconciliations and mitigating duplicate reporting.
- Cut average query resolution time by 15 minutes by analyzing and optimizing JIRA support queues and escalation workflows using Power BI.
- Supported revenue growth across 15+ deals by giving tailored product onboarding and training to new funds, while collaborating with sales teams.
- Reduced churn by 22% by managing separate client accounts, ensuring timely and accurate reporting of multi-asset risk and P&L.
- Reduced data integrity risk by owning Bloomberg and Refinitiv breaks and collaborating with Data Engineering to quickly resolve discrepancies.
- Trained juniors in issue triaging and investigation, assuring quality through strict documentation standards and shared knowledge usage.

Product Marketing Manager | Ecovia

Nov 2020 - May 2021

- Replaced 400 kilos of single-use plastic with a reusable packaging product by shaping awareness and growth strategies.
- Grew social media following by 2,500+ through insight-driven digital campaigns focused on advocating sustainable consumption.
- Improved segmentation and targeting by forecasting sales using A/B tested consumer patterns in Python.

Market Data Analysis Intern | Reliance Jio Creative Labs

Nov 2019 - Sep 2020

- Drove 18–22% higher engagement by analyzing consumer data and informing campaign strategy for global brands like Reliance and Coca-Cola.
- Optimized campaign rollouts through agile marketing, using Python for sentiment analysis and Tableau for leadership reporting.

Projects

- Financial Research Agent:** Reduced an hour-long stock analysis to two minutes by building a professional-grade buy-side agent by equipping Claude with 19 AI-powered financial tools, synthesizing real-time market data and fundamental news to drive quantitative trading strategies.
- Pocket Scout – Fantasy Premier League Agent:** Improved decision-making on Fantasy Premier League transfers by building an agentic app that reasons with Claude and calls a deterministic player scoring tool with a knowledge-grounded RAG pipeline to provide customized advice. Applied robust prompt-injection guardrails and an extensive backtesting suite covering a decade of historical data, all shipped via Docker.
- FIFA WC 2026 Bracket Analyst:** Improved decision-making on filling the FIFA World Cup bracket by building and shipping a full-stack app where a guarded Claude agent autofills your bracket, backed by a reliable odds engine that predicted all 4 semifinalists, both finalists, and the champion.

Education

MS - Information | University of Wisconsin-Madison

MBA - Finance | NMIMS University

Bachelor's - Information Technology | NMIMS University

Skills

- Finance:** Middle and Back office workflows, Liquidity analysis, Financing, Corporate actions, General Ledger, Tax Lots, Fixed income, Derivatives
- AI/ML:** Forward Deployed, Loop Engineering, Claude, Gemini, Azure AI, AWS Bedrock, Copilot Studio, Prompt Engineering, RAG, LLMs, REST API, Fast API, Cohere, Pinecone, Weaviate, Milvus, NumPy, Scikit-Learn, TensorFlow, PyTorch, Predictive Modeling, Statistical Analysis
- Data Engineering/Cloud Platforms:** SQL, NoSQL, MongoDB, Fabric, Snowflake, Databricks, GCP, Kubernetes
- Data Analysis & BI:** Advanced Excel, Microsoft Office, Macros, Tableau, Power BI, Pandas, Looker, Matplotlib, Seaborn, Plotly, R, MATLAB
- Languages:** C, C++, Python, Java, JavaScript, TypeScript, Node.JS