

# TULIKA JAJORIA, CFA<sup>®</sup>

Vice President – Finance

CFA Charterholder • MBA Finance • BFIA (Financial & Investment Analysis) • FMVA<sup>®</sup> Certified  
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## EXECUTIVE SUMMARY

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Strategic Finance leader with 14+ years across FP&A, Strategic Finance, Corporate Development, Business Finance, Investment Banking, and M&A advisory at Tier-1 global banks, fintech scale-ups, and Big-4 advisory firms. Currently lead a 20-person finance team governing a GBP 900M+ cost base at Barclays, having identified ~GBP 10M in cost savings now reflected in the latest forecast alongside a sustained ~20% year-on-year efficiency improvement. Trusted strategic partner to founders and C-suite leadership on commercial and go-to-market decisions — including a market-analysis call that redirected a fintech scale-up's entire go-to-market focus to the US region. CFA Charterholder with deep expertise in financial modelling, valuation, regulatory reporting, and enterprise-wide transformation.

## CORE COMPETENCIES

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Financial Planning & Analysis (FP&A) | Financial Modeling | Budgeting & Forecasting | Variance Analysis | M&A Due Diligence | Valuation | Corporate & GTM Strategy | Cost Management | Risk Management | Business Intelligence | Stakeholder Management | Process Automation | Finance Transformation | Team Leadership | Clear Communication

## TECHNOLOGY & SYSTEMS

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Capital Markets & Research: Bloomberg Terminal, Capital IQ, Dealogic, Reuters, SNL Financial

ERP & Finance Systems: Oracle OBIEE, SAP, Hyperion Essbase, Salesforce CRM

Analytics & Visualisation: Claude, Power BI, Tableau, Alteryx, Python, R, Advanced Excel, Power Query, Think-Cell

## PROFESSIONAL EXPERIENCE

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**Barclays Global Service Center**, Gurugram, India | *Jul 2023 – Present*

**Vice President – Finance Business Partner**

- Identified risk and opportunity areas within the Customer Care business area through active cost-base management, consolidating findings into ~GBP 10M in cost savings reflected in the latest forecast.
- Delivered a sustained ~20% year-on-year efficiency improvement, creating capacity to absorb expanding team and individual responsibilities without headcount growth.
- Lead a team of ~20 finance professionals governing a GBP 900M annual cost base for Barclays UK Bank (~15,000 FTEs); translate enterprise transformation priorities into 5-year strategic plans, zero-based budgets, and driver-based rolling forecasts.
- Drove headcount rationalisation supporting Barclays' UK-to-India location strategy.
- Delivered a 10% year-on-year improvement in cost-benefit realisation and a 5% reduction in operational risk exposure by redesigning governance frameworks and strengthening control environments.
- Translate cost variance drivers, trend analysis and vendor contract performance into KPI dashboards and board-level commentary, enabling informed decision-making by senior leadership committees.
- Championed a finance automation programme that replaced paper-intensive back-office workflows with digitised processes — driving team-wide tool adoption, cutting manual effort, and improving data integrity.

**OakNorth (India) Private Limited**, Gurugram, India | *Apr 2022 – Jul 2023*

**Vice President – Strategy & Operations**

- Partnered directly with co-founders on go-to-market strategy spanning US, UK, and APAC markets; the resulting market analysis proved the US opportunity significantly outsized UK/APAC and drove a company-wide decision to reallocate Account Executive coverage entirely onto the US — a founder-level strategic call, not a routine FP&A output.
- Built GTM frameworks, unit-economics models, and ROI analyses that informed global customer acquisition strategy and investment decisions for executive decision support.
- Structured complex commercial deals in partnership with investment and product leadership, integrating financial performance evaluation into deal governance and pricing approval workflows.

**OakNorth (India) Private Limited**, Gurugram, India | *Jul 2020 – Mar 2022*

**Deputy Vice President – Sales Operations**

- Lifted reporting accuracy by 25% and cut time-to-insight for senior leadership by leading a cross-functional CRM and analytics platform transformation spanning Sales, Product, and Leadership stakeholders.
- Cut manual reporting effort by automating legacy data-aggregation processes as part of the platform transformation, freeing analyst capacity for higher-value commercial analysis.

**Ernst & Young Global Delivery Services (EY GDS)**, Gurugram, India | *Jul 2018 – Jul 2020*

**Associate Manager – Strategy & Operations, Financial Services**

- Spearheaded buy-side and sell-side commercial due diligence engagements across fintech, retail banking, and asset management, delivering market-sizing studies, trend analysis, competitive landscape assessments, and financial model validation for M&A transactions.
- Crafted market-entry strategies for fintech clients entering EMEA, APAC, and Americas markets, assessing regulatory environments, competitive dynamics, and acquisition-led growth pathways.
- Advised PE and VC clients on deal structuring, risk-adjusted return modelling, and investment thesis validation for cross-border transactions across multiple asset classes.

**PayU Payments (Naspers Group)**, Gurugram, India | *Mar 2017 – Jun 2018*

**Senior Manager – Business Finance, Planning & Analytics**

- Owned the full planning cycle — annual budgets, rolling forecasts, and 3-year strategic plans — for a high-velocity fintech platform, embedding data-driven discipline into leadership decision-making.
- Tracked revenue KPIs and ran variance and trend analysis on cost drivers across business units, surfacing actionable insights that improved margins and eliminated non-value-added expenditure.
- Assessed commercial finance terms and long-run profitability for a portfolio of strategic partnerships, prioritising alliances with the highest risk-adjusted value to the business.
- Coordinated management reporting, competitive benchmarking, and investment-case evaluation, ensuring timely and accurate financial reporting to senior stakeholders.

**Goldman Sachs (India)**, Bangalore, India | *Jun 2015 – Mar 2017*

**Analyst – Management & Strategy, Investment Banking Division**

- Built DCF, LBO, and trading-comparable valuation models supporting multi-million-dollar M&A and capital-raising transactions across TMT and industrial sectors.
- Re-engineered executive reporting workflows, cutting turnaround time by 15% through process standardisation and automation of data-aggregation tasks.
- Maintained deal-mandate registers, revenue reconciliations, league-table submissions, and P&L reviews, ensuring data accuracy underpinning IBD senior leadership reporting.
- Synthesised market-share data and competitive intelligence to support pitch books and live transaction advisory for bulge-bracket clients across global capital markets.
- Extracted and analysed client revenue metrics — including profitability, frequency of engagement, and wallet-share trends — from Bloomberg, Capital IQ, and Dealogic to inform client-coverage strategy.

**Fidelity Business Services**, Bangalore, India | *Aug 2013 – May 2015*

**Senior Specialist – Decision Support Finance**

- Developed and launched interactive Demand Forecast Dashboards leveraged by senior leadership to drive strategic resource allocation, workforce planning, and capacity utilisation decisions.
- Constructed multi-scenario financial models supporting annual budgets, quarterly forecasts, and executive planning processes, improving forecast accuracy and enabling proactive performance management.
- Led integration of a headcount reporting tool that democratised data access for 100+ cross-functional stakeholders, replacing manual extracts with near-real-time self-service analytics.
- Promoted from Executive Management Trainee in Aug 2013 in recognition of performance on financial modelling and planning deliverables.
- Recipient of Fidelity's "You've Earned It" Award for outstanding individual performance and process-improvement leadership.

**Fidelity Business Services**, Bangalore, India | *Jun 2012 – Jul 2013*

### **Executive Management Trainee – FP&A**

- Administered capital expenditure planning and budget tracking across functions, identifying efficiencies and reducing unnecessary spend through rigorous cost-benefit analysis.
- Partnered with controllership on intercompany billing, cost-centre reconciliation, and invoicing governance, strengthening compliance and accelerating period-end close timelines.

### **EDUCATION**

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CFA Charter, Chartered Financial Analyst — CFA Institute, USA — Passed

MBA, Finance — Symbiosis Institute of Business Management, Pune — GPA: 2.97 / 4.0

B.F.I.A., Financial & Investment Analysis — Shaheed Sukhdev College of Business Studies, Delhi University — 81%, Rank 3

### **PROFESSIONAL CERTIFICATIONS & LICENCES**

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- FMVA® – Financial Modelling & Valuation Analyst, Corporate Finance Institute (CFI), 2020
- NSE Certified Market Professional (NCMP) Level 1: Investment Analysis & Portfolio Management – 90%, Financial Markets – 82%, FIMMDA-NSE Debt Market – 74%

### **EARLY CAREER & INTERNSHIPS**

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- UltraTech Cement Limited – Finance Department, Mumbai (Summer 2011)
- NTPC Limited – Cash & Banking Division, New Delhi (Summer 2009)
- JM Financial Mutual Funds – Finance Division, New Delhi (Summer 2008)