

Alex Morgan

Finance & Data Analyst

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PROFILE

Finance and data analyst with experience in financial reporting, dashboard development, and analytical tooling. Focused on turning data into clear, actionable insights for commercial and operational decisions. Experienced with Power BI, Python, SQL, and Excel across fast-paced finance and analytics environments.

EXPERIENCE

Finance Analyst

NovaTech Solutions | London, UK | 2024 - Present

- Built Power BI dashboards to track P&L, budget vs actuals, and KPIs for leadership reporting.
- Reduced month-end close reporting time by 12x through automated variance analysis pipelines.
- Saved 150 hours per year through automation of recurring financial reporting packs.
- Conducted variance analysis and presented findings to senior finance stakeholders.

Data & Reporting Intern

BrightLedger Finance | London, UK | 2023 - 2024

- Prepared monthly management packs and supported the finance team with data analysis.
- Automated recurring reporting using VBA macros, saving 4 hours per week.
- Built Python-based demand forecasting models to improve accuracy of financial planning.

Business Analytics Consultant

University of Edinburgh | Edinburgh, UK | 2022 - 2023

- Delivered analytics consultancy for a GBP 5M retail group as part of a university engagement.
- 100% of strategic recommendations adopted by the client team.
- Analysed commercial performance data to identify operational improvement opportunities.

EDUCATION

BSc Finance & Management, First Class Honours

University of Edinburgh | 2019 - 2022

Dissertation: Data-Driven Demand Forecasting in Retail Supply Chains (94% accuracy). Modules: Corporate Finance, Financial Modelling, Business Analytics, Data Science for Business, Quantitative Methods, Strategic Management.

CERTIFICATIONS

Microsoft Power BI Data Analyst (PL-300)

Microsoft, 2024

CFA Level I

CFA Institute, in progress (exam December 2026)

Google Data Analytics Certificate

Coursera, 2023

SKILLS

Analytics & BI

Power BI, Tableau, Looker, DAX, Power Query

Finance

Financial modelling, Budgeting, Forecasting, Variance analysis, KPI reporting

Data & Coding

Python, SQL, pandas, VBA, Excel

Soft Skills

Stakeholder communication, Board reporting, Data storytelling