

Akshay Bhatnagar

Senior Business Analyst | AI Product Manager

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PROFESSIONAL SUMMARY

Experienced and purposeful Senior Business Analyst with 14+ years of comprehensive expertise in Trading applications. Proven history of successfully leading teams and implementing effective processes to deliver high-quality software solutions. Has also served as Product Owner on settlement and regulatory change initiatives, owning the product backlog and aligning delivery with business priorities. Strong leadership skills combined with excellent communication and collaboration abilities.

PROFILE SUMMARY

- Offering 14+ years of expertise in Capital Markets, Equity & Derivatives Trading and Fixed Income Securities.
- Worked across Asset Management and Wealth Management projects.
- Served as Product Owner on trade settlement and regulatory change initiatives, owning the backlog and driving delivery to completion.
- Well-versed with all stages of Trade Life Cycle.
- Experience in Regulatory Projects.
- Helped in implementation of MIFID 2 related requirements in multiple projects.
- Expertise in facilitating Requirement Elicitation, Solution Discovery, and Design Sessions.
- Expertise in facilitating UAT.
- Proficient in Stakeholder management and communicating with both internal and external clients/vendors.
- Exposure to all stages of SDLC and STLC.
- Building AI products with agentic RAG, hybrid retrieval and multi-agent workflows — see AI Projects below.

SKILLS

Business & Analysis	Requirement Elicitation, Business Analysis, Requirement Analysis, Data Analysis, Data Modelling, Data Lineage, Agile Methodology
Tools & Tech	Power BI, QlikSense, MS SQL Server, MS Excel, Azure DevOps
Domain	Capital Markets, Fixed Income Products, Equities, Derivatives, Trade Life Cycle, Asset Management, Portfolio Management, Wealth Management, Trading Applications
Soft Skills	Leadership, Team Management, Team Building, Communication, Problem Solving, Critical & Logical Thinking, Analytical Skills, Collaboration, Detail Oriented

AI SKILLS

Agents & RAG	Agentic RAG, ReAct LLM tool-loops, multi-agent orchestration (LangGraph), RAG product design with grounding gates, citation and forbidden-language guardrails
Retrieval & Eval	Hybrid retrieval (dense + BM25/FTS), reranking, contextual retrieval; evaluation with golden datasets, trajectory evaluation and metrics (MRR, recall@k, precision@k)
LLM Engineering	Claude API & Anthropic SDK; prompt engineering, context engineering, harness engineering; prompt caching; embeddings (OpenAI); vector databases (Supabase/Postgres + pgvector)

AI PROJECTS [Self-built prototypes — complete details on the website]

Adjudicator (SEBI) — Agentic-RAG compliance assistant [In progress]

- Retrieves the currently-valid SEBI obligations for a product-change scenario, traces supersession to the consolidated position, and flags gaps — every finding cited to a source circular. Recall-first hybrid retrieval (dense + BM25/FTS) + Claude Haiku reranker (MRR 0.79 → 0.97); hand-rolled Anthropic SDK ReAct tool-loop; eval harness with golden dataset + trajectory evaluation.
- Stack: Claude, Anthropic SDK, FastAPI, Next.js, Supabase/Postgres, pgvector.

github.com/akshay100188/adjudicator-sebi

CurveIQ — Descriptive yield-curve analytics (US & India) [Live]

- Term structure, slope/spreads, real-vs-nominal, PCA and the equity–yield relationship over US & Indian rates, each explained in plain language — strictly descriptive, never advice or forecast. Deterministic unit-tested compute produces every number; a RAG explainer narrates them, with a lint blocking prescriptive output. Authentic data (FRED/RBI/NSE), daily validation-gated refresh.
- Stack: Python, Next.js, TypeScript, Claude, OpenAI embeddings, Supabase/pgvector.

github.com/akshay100188/CurveIQ

Inception — Multi-agent product-spec generator [Live]

- Turns a plain-English idea into a reviewer-approved software spec — five agents (requirements → architecture → tech stack → estimation) on a LangGraph state machine with two human-in-the-loop checkpoints; outputs a 19-section report + 5-screen wireframe. Runs zero-credit by default (grounded in 81 real open-source projects); optional Claude Sonnet mode.
- Stack: React, FastAPI, LangGraph, Claude (optional), Supabase (pgvector + Auth).

github.com/akshay100188/project-inception

WORK EXPERIENCE

EY (September 2024 – Present)

Client: Raymond James Wealth Management

Technology: SQL Developer, QlikSense, Azure DevOps, MS Excel

- Writing requirements for Cash Portal application.
- Investigating issues encountered in Production.
- Communicating with Product team for understanding requirements.
- Creating PBIs for requirements.
- Giving demos to product team & facilitating UATs.
- Creating dashboards in QlikSense.
- Analysing data for FA segmentation for measuring their performance.

PureSoftware Pvt. Ltd. (July 2019 – Present)

Client: Saxo Bank

Technology: Power BI, API, Postman, Kibana, MS SQL Server, Azure DevOps, MS Excel, Confluence, Kafka

Saxo Bank, a Danish investment bank, provides online trading services for a range of financial instruments, including stocks, bonds, forex, and commodities, serving a diverse global clientele with competitive solutions.

- Managed medium to large sized change projects within the Front Office and Back Office operations through full project life cycle from the envisioning, definition of business requirements and processes, through to systems development, testing and implementation.
- Proactively identified and implemented cost saving initiatives for the Bank.
- Work closely with business stakeholders in designing, planning, and implementing Regulatory and commercial solutions.
- Creating dashboards for reporting and project tracking purposes.
- Conducting UATs and giving demos to end users.
- Implementing new processes and improving the existing ones to increase productivity of team.

Major Projects:

- **Global KID** – Under MIFID-2 implementation, it is required by the bank to provide the client with the Key Information Document (KID) which contains information related to the financial product being traded. For this organizational level change, I was enrolled as a lead BA. Coordinating with multiple teams, creating requirement documents, and tracking progress was the primary area of focus. Giving demos and conducting UAT were other areas of involvement.
- **Settle/Unsettle** – Saxo bank settles the account of the customers at the end of the day whereas actual settlement from exchange follows a T+2 cycle. This project was initiated to bring the settlement cycle of the bank in sync with the actual settlement cycle of various financial products. Worked as Product Owner for this project.

Sapient Global Markets (March 2012 – July 2019)

Client: Wellington Management

Technology: UFT, SilkTest, JIRA, PL/SQL, MS Excel, VB Script

Wellington Management Company is a renowned investment management firm, providing diverse financial services to clients worldwide. With expertise in portfolio management, they aim to optimize returns and secure long-term success.

- Part of the Fixed Income Team.
- Worked on various tracks such as Repos, MBS, Swaps, CDS, Futures, etc.
- Executing story level test cases for new/modified functionalities in application.
- Functional/UI Automation using UFT & VB Script.
- Migration of old scripts from Silk Test to UFT.
- Ramping up the new joiners in the Automation Team.
- Code Reviews for Automation Scripts.
- Creating test cases for functional tracks.
- Giving demos to Clients / Conducting UATs.
- Conducting MUTs.
- Handling regression cycle for releases.

CERTIFICATIONS

CFA Level 1 Certified • CSPO-1® Certified Professional • Oracle Database SQL Certified Associate • Microsoft Certified: Power BI Data Analyst Associate

EDUCATION

B.Tech (CS) – Priyadarshini College of Computer Sciences (70.2%) • XII (ISC) – Hartmann College (77.25%) • X (ICSE) – Hartmann College (80.24%)