

# SARAH DUNNING

Dual Nationality (Swiss & French)  
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Investment professional with 7+ years of experience across real estate, private equity, and M&A. Proven expertise in financial modelling, and multi-disciplinary due diligence, combined with hands-on asset management, performance monitoring, and transaction execution. Seeking to leverage strong analytical rigor and cross-functional expertise to contribute meaningfully to a high-performing team.

## PROFESSIONAL EXPERIENCES

### SWISSROC ASSET MANAGEMENT – Value-add/Opportunistic Real Estate

08.2025-TODAY

Analyst – Geneva, Switzerland

- Led market intelligence, asset-level analysis, and financial modelling (DCF, sensitivities) across a portfolio of 10 real estate assets, delivering data-driven insights to support portfolio monitoring and long-term value-creation strategies.
- Oversaw day-to-day asset management activities — leasing oversight, technical and administrative follow-up, budget tracking, and KPI monitoring — to optimise operational performance and ensure alignment with asset-level business plans.
- Coordinated cross-functional stakeholders and contributed to strategic planning by producing investor-ready reporting, presentations, and structured documentation, helping drive performance optimization and strengthen portfolio returns.

### MIDI MANAGEMENT – Growth Capital (Consumer Goods)

07.2024-11.2024

Visiting Analyst – Geneva, Switzerland

- Performed commercial, financial and operational due diligence ("DD") on 1 prospective investment, in the Furniture space.
- Collaborated on asset management tasks for portfolio companies, including oversight of new product category launch (design, development), sales & marketing analysis for market expansion, and review of company operations.

### FORESTAY CAPITAL – Venture Capital (Early Growth, Enterprise AI & SaaS)

03.2024-06.2024

Visiting Analyst – Geneva, Switzerland

- Performed commercial, financial and operational due diligence on prospective investments (>10 1<sup>st</sup> DD step, 1 in-depth DD).
- Contributed to sourcing efforts in specific geographies performing first screen of prospective investments (>200 companies).
- Collaborated on asset management tasks for portfolio companies, including board advisor recruitment.

### LOMBARD ODIER ASSET MANAGEMENT – Private Equity & Venture Capital

05.2019-08.2023

Investment Analyst – Geneva, Switzerland

- Executed over 20 GP-led secondary and co-investment transactions, including drafting investment memorandums and conducting valuation, financial modeling, and scenario analysis.
- Collaborated on portfolio management through performance monitoring, quarterly valuation reviews, and LP Reporting.
- Coordinated with external service providers, GPs, and internal departments on deal execution, and operational processes.
- Supported fundraising efforts (Private Banking and Institutional Clients) by preparing investor materials and customised client presentations, including tailored cash-flow plannings for integration within broader portfolio.

### PRICEWATERHOUSECOOPERS – M&A Advisory

10.2017-04.2019

Deals Analytics and Technology Services Consultant – Zürich, Switzerland

05.2018-04.2019

- Developed new data analytics offering in collaboration with top management with principal aim to support clients in data-driven decision-making and Deals team in transaction execution.
- Performed quantitative analyses (e.g. Sales analysis, KPI analysis, Attrition rate analysis) and modeling of KPI reporting dashboards using data visualization tools.

### Mergers and Acquisitions Intern – Geneva, Switzerland

10.2017-04.2018

- Conducted company valuation exercises (e.g. Traded & Transaction Multiples, DCF).
- Prepared Information Memorandums for sell-side mandates and performed target screenings for buy-side clients.

### CHAPPUIS HALDER – Financial Services Management Consulting

09.2015-08.2016

Analyst – Geneva, Switzerland

- Collaborated on strategic projects for Swiss Financial Institutions (e.g. definition of digital transformation strategy).

## EDUCATION

### MASTER OF SCIENCE (MSC)

Imperial College Business School

**London, UK - 2016-2017**

- Finance and Accounting

### BACHELOR OF SCIENCE (BSC)

HEC Lausanne

**Lausanne, CH - 2012-2015**

- Management

## SKILLS

### Financial Modelling

- Excel, VBA

### Data Visualization

- PowerBI, Alteryx, Tableau

### Research

- Bloomberg, Preqin, Pitchbook

## CERTIFICATION

### CFA PROGRAM

- Level III Candidate (Aug. 2026)

## LANGUAGES

English

- Native

French

- Native

German

- Basic

Spanish

- Basic