

SARAH DUNNING

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Detail-oriented Private Equity Analyst with 5+ years of experience in financial modelling, market research, and investment analysis. Seeking to leverage analytical skills and industry knowledge to contribute to a dynamic investment firm.

PROFESSIONAL EXPERIENCES

MIDI MANAGEMENT – GROWTH CAPITAL (CONSUMER GOODS)

07.2024-11.2024

Visiting Analyst – Geneva, Switzerland

- Performed commercial, financial and operational due diligence on prospective investments
- Supported with Limited Partner (“LP”) Reporting and internal monthly portfolio review exercises.
- Collaborated on asset management tasks for portfolio companies, including oversight of new product category launch (design, development), sales & marketing analysis for market expansion, review of company operations for efficiency improvement, and recruitment of key hires.

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
- Contributed to sourcing efforts in specific geographies performing first screen of prospective investments (>200 companies).
- Supported with LP Reporting and internal quarterly portfolio review exercises.
- Collaborated on asset management tasks for portfolio companies, including board advisor recruitment and identifying potential clients.

LOMBARD ODIER ASSET MANAGEMENT – PRIVATE EQUITY & VENTURE CAPITAL

05.2019-08.2023

Investment Analyst – Geneva, Switzerland

- Part of the broader Private Equity Team, with a focus on Secondaries (GP-led) and Co-Investments deal execution via information memorandums redaction, and conducting financial modelling, valuation, and other financial analyses.
- 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

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.
- Engaged in conceptualisation and modeling of KPI reporting dashboards (internal and external).
- Performed quantitative analyses (e.g. Sales analysis, KPI analysis, Attrition rate analysis) using data visualization tools.

Mergers and Acquisitions Intern (Internship) – Geneva, Switzerland

10.2017-04.2018

- Conducted company valuation exercises (e.g. Traded Multiples, Transaction Multiples, DCF) to determine fair market value as well as CapEx and Working Capital analyses.
- 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 (Internship) – Geneva, Switzerland

- Collaborated on strategic projects for Swiss Financial Institutions (e.g. definition of digital transformation strategy for insurance player and benchmarking of main Swiss Retail banks digital positioning).

EDUCATION

MASTER OF SCIENCE (MSC) IN FINANCE AND ACCOUNTING

Imperial College Business School – London, United Kingdom

BACHELOR OF SCIENCE (BSC) IN MANAGEMENT

HEC Lausanne, University of Lausanne – Lausanne, Switzerland

CERTIFICATION

CFA PROGRAM

- Level III Candidate

SKILLS

Financial Modelling

- Excel, VBA

Data Visualization

- PowerBI, Alteryx, Tableau

LANGUAGES

English

- Native

French

- Native

German

- Basic

Spanish

- Basic

Research

- Bloomberg, Preqin, Pitchbook