Dana AlShammari

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Professional Summary

International Trade and Finance student at King Saud University with hands-on experience in investment analysis, private markets, equity research, and startup evaluation. Skilled in financial analysis, market research, and investment due diligence, with a strong interest in Private Equity, Venture Capital, and Investment Management.

Education

- **Bachelor of Arts in International Trade and Finance**
  King Saud University (KSU) | July 2027 (Expected)

Professional Experience

Investment Analyst – Jaree | January 2026 – August 2026

- Evaluate investment opportunities across early-stage and growth-stage companies.
- Conduct market research, financial analysis, and business model assessments.
- Support investment recommendations and due diligence activities.
- Participate in startup screening and deal evaluation processes.
- Prepare investment reports and presentations for internal stakeholders.

Investment Analyst Intern – Jaree | November 2025 – January 2026

- Conducted investment analysis on startups, including business model evaluation, market sizing, and financial assessment.
- Performed deal sourcing and startup screening activities.
- Identified and sourced investment opportunities that progressed through evaluation and resulted in signed agreements.
- Assisted in preparing investment research and analytical reports.

Mentee – CFA Institute Global Mentorship Program | August 2026 – Present

- Participate in structured mentorship focused on investment management and professional development.
- Engage with investment professionals to strengthen industry knowledge and career readiness.

Budget Consultant – Design & Fashion Club, King Saud University | July 2026 – Present

- Advise on budgeting, financial planning, and resource allocation for club initiatives.
- Review proposed expenditures and support budget monitoring and financial decision-making.
- Contribute to improving spending efficiency and financial controls.

Vice Chair – Reports & Budget Committee, Economics Club, King Saud University | August 2026 – Present

- Support the management of the committee's reporting, budgeting, and financial monitoring activities.
- Oversee the preparation and review of periodic reports and budget tracking.
- Coordinate reporting, quality, and documentation activities across committee teams.

Budget Officer – Finance Committee, Student Partnership at King Saud University | August 2025 – June 2026

- Manage budgets and financial allocations for student initiatives and committees.
- Monitor expenditures and ensure alignment with approved budgets.
- Prepare financial reports and budget tracking summaries.
- Support financial planning and resource allocation activities.

Project Developer – Innovation and Entrepreneurship Club | October 2025 – January 2026

- Developed and structured projects aligned with innovation and entrepreneurship objectives.
- Assisted in project planning, implementation, and performance evaluation.
- Collaborated with stakeholders to identify opportunities for new initiatives.

Saudi Private Markets Researcher – Safqa | October 2025 – November 2025

- Researched private equity, venture capital, and private market transactions in Saudi Arabia.
- Analyzed investment trends, fund performance, and market developments.
- Produced market intelligence reports and investment insights.

Financial Content Analyst – Investment Club | January 2025 – January 2026

- Conducted sector and company analysis for educational and investment-related content.

- Assisted in valuation exercises and financial research projects.
- Developed concise financial reports and market insights.
- Supported investment awareness initiatives through analytical content.

Graphic Designer – Ethmar Financial | January 2025 – June 2025
- Designed visual materials supporting financial research and educational initiatives.
- Created presentations, infographics, and financial content assets.
- Ensured consistency with organizational branding and communication standards.

Projects

Fellowship Program 2.0 – Ahhl Mostashar | October 2025 – May 2026
- Contributed to content creation, visual design, and digital media coverage.
- Supported communication campaigns and financial leadership initiatives.
- Assisted in developing engaging media content for program activities.

Founder – Naqdi | February 2026 – Present
AI-Powered Personal Finance App
- Developing an AI-powered personal finance platform designed to improve financial decision-making and saving behavior among young adults.
- Designed the product concept, behavioral finance framework, and core features, including AI coaching, cash-flow insights, and personalized saving goals.
- Conducted market research and developed the business model, product roadmap, and partnership strategy.

STC Case Study – King Saud University | February 2025 – April 2025
- Led a team analyzing STC's corporate governance, ethics, and business practices.
- Conducted research and presented strategic findings and recommendations.

Road to CFO Program – Riyad Capital & Ethmar Financial | February 2025
- Designed media materials and visual content for program activities.
- Supported communication and branding initiatives within the program.

Certifications & Courses
- **Alternative Investments – BlackRock Academy**
- **CME-1B Certification – Capital Market Authority (CMA) | October 2025**
- **McKinsey Forward Program | April 2025**
- **Project Building Camp – EY | November 2025**
- **IFRIC 12 Service Concession Arrangements – Deloitte | April 2025**
- **Fintech Summer Session 2025 | July 2025**

Core Competencies
- Investment Analysis
- Financial Modeling & Valuation
- Equity Research
- Private Equity & Venture Capital Fundamentals
- Startup Evaluation & Due Diligence
- Deal Sourcing & Screening
- Financial Reporting & Market Research
- Advanced Microsoft Excel & PowerPoint
- Budget Planning & Financial Control
- Presentation & Stakeholder Communication

Awards & Achievements
- **Best Administrative Contribution Award – King Saud University | Second Semester 2026**
- **Best Committee Leader Award – King Saud University | March 2026**

Volunteer Experience
- **Volunteer Contributor | 300+ Volunteer Hours**

Languages
- **Arabic**
- **English**