

investment analyst.

Job summary

The role of the Investment Analyst is to make investment recommendations to the Investment Director based on in-depth analysis which includes fund and country/theme specific analysis. The Investment Analyst will also input into market timing of buy/sell guidance and work with the existing team to generate positive relative returns for clients.

Core responsibilities

- responsible for researching and analysing collectives and making written and verbal recommendations to the Investment Director
- undertake extensive research to understand exactly how the current/potential third party collective holdings are positioned
- carry out a rigorous process of qualitative assessment through face-to-face interviews with fund managers to:
 - consider the fund manager's experience and their back-up/support teams
 - assess the sustainability of the performance of the fund manager's fund (has it been achieved through skill or luck and is it consistent or random)
 - attain a full understanding of investment management philosophies and processes (is it repeatable and embedded)
 - review the fund's procedures and risk controls
 - review the stability of the Fund House (or their parent group)
- arrange and run company meetings
- attend relevant group meetings and share investment ideas
- communicate ideas and knowledge to the rest of the Investment Team and to WEALTH at work's Strategic Investment Planners
- represent WEALTH at work in a way that maintains and enhances the Company's reputation
- input, produce and report on investment performance measurement
- performance attribution analysis
- assist in the ongoing structural improvements to investment management systems
- undertake daily routines, such as investigating discrepancies in the investment variance reports and share prices and process client withdrawals

Desirable skills/experience

- strong numerical, analytical and problem solving skills
- good PC skills and advanced knowledge of Excel imperative
- excellent communication and presentation skills
- good attention to detail
- comfortable communicating with all levels of management

Essential qualifications

- CFA qualified or equivalent (or minimum part-qualified)