JOB DESCRIPTION

Name: Vacant	**Role Title:** Senior Investment Analyst
Line Manager Name: James Beaumont	**Line Manager Title:** Head of Public Markets

Purpose

The Senior Investment Analyst within the Public Markets team will play an important role in shaping, delivering and enhancing London CIV's listed markets investment offering.

Working closely with Portfolio Managers the role holder will support manager research and selection across equities, fixed income and liquid alternatives, steer portfolio construction and risk oversight, support the delivery of high-quality reporting and support client engagement with Partner Funds.

As part of a small and collaborative team, the role holder will be expected to bring sound judgement and a high level of analytical rigour.

This is a great opportunity for anyone who is keen to develop their career in Public Markets. During your time with us, you will get the opportunity to support our investment, risk management, fund and manager monitoring and client servicing processes. You will get the opportunity to conduct quantitative and qualitative analysis in collaboration with Portfolio Managers, Analysts, and other stakeholders, including external Investment Managers and suppliers of data and analytical tools

Key Responsibilities

Your main responsibilities will provide plenty of scope to demonstrate and develop your skills. We are a fast-growing, evolving company and what you do in your role is likely to grow in the future as you grow, and we adapt to the evolving needs of our Partner Funds:

- You will be expected to support Portfolio Managers with fund and investment manager monitoring, including generating narrative input into reports and presentation materials prepared for our Partner Fund investors
- Support Portfolio Managers in identifying opportunities for optimisation and value enhancement through the design of new products, enhancing existing funds, selecting investment managers, building model portfolios and attracting new investors
- Enhance and/or monitor dashboards and other reports summarising performance and risk metrics and key characteristics of portfolios, including ESG and climate data, are used by internal committees. Developing, enhancing and maintaining these dashboards is an important part of the role
- Help influence Portfolio Manager selection decisions across London CIV's multi-asset portfolios, with emphasis on Equities, Fixed Income, and Liquid Alternatives, contributing to robust portfolio design and risk oversight
- Support the smooth transition of non-LCIV assets into London CIV funds. Coordinate with Operations to ensure accurate and timely updates to portfolio holdings and legal documents, as well ensuring alignment with Partner Funds' expectations

Note: This job description is aimed to be illustrative and is not exhaustive of all the duties and responsibilities which could be contained within this position. The role holder may be asked to undertake other duties and responsibilities which are commensurate with this area of work and grade.

- Carry out manager due diligence on existing LCIV holdings, non-LCIV funds and across the asset class peer group. Form clear, evidence-based recommendations and present conclusions to Portfolio Managers
- Build strong and value-add relationships with key internal colleagues in the wider Investment team, Commercial and Operations team. Act as a point of contact for the Commercial and Strategic Asset Allocation team on Partner Fund queries, helping to align investment recommendations to Partner Fund requirements.
- Role model, coach and support less experienced analysts in the team, reviewing outputs and sharing best practice. Promote cross-functional collaboration to resolve issues and continuously improve processes.

You will also have the opportunity to interact with stakeholders with a range of financial sophistication and understanding – from Investment Managers and Consultants, Pension Officers through to Elected Officials in Local Government.

Key Skills and Experience

Essential

- Prior experience in asset management, ideally in a fund selection and/or due diligence role
- Proven experience of working with multi-asset portfolios, with emphasis on Equities, Fixed Income, and Liquid Alternatives, contributing to robust portfolio design and risk oversight
- Developed understanding of global capital markets and investment strategies across multiple asset classes
- Solid experience in portfolio construction, risk management, and due diligence
- Sound understanding of ESG and Responsible Investment principles and their practical application
- Advanced Microsoft Excel skills and strong PowerPoint skills; familiarity with PowerBI
- Well organised with good accuracy and attention to detail
- A team player with good written and oral communication skills and who enjoys problem-solving
- Someone who is resourceful enough to try to find the answers when they don't know something but also isn't afraid to ask for help

Desirable

- Data and Coding capabilities (e.g. Python or SQL) and experience building dashboards in PowerBI
- Experience in implementing and using risk management systems
- Good experience in using eVestment or comparable platforms
- Experience planning and executing manager/fund transitions, coordinating with operations and fund accounting teams, and reviewing investment-related legal documents
- Experience preparing reports for Investment Committees and clients and supporting preparation of presentations
- Knowledge of the UK pensions market, the changing landscape and challenges faced.

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What we offer

Our values sit at the heart of everything we do. To truly foster a collaborative and supportive workplace, we offer all employees a range of benefits, including:

- From day one, you'll have on-the-job learning opportunities across a range of asset classes and exposure to leading managers, with plenty of hands-on experience to support your development.
- Financial support and paid study leave for relevant qualifications or professional development as part of your continuous learning journey.
- A company culture that champions innovation, continuous learning, and personal responsibility within a modern and flexible working environment.
- Employees typically work in the Southwark office a minimum of 50% per fortnight. Our Southwark office operates a hot-desking system and includes access to an on-site gym.
- A minimum of 29 days' annual leave per year, plus public holidays.
- A generous pension scheme, enhanced family-friendly policies, and a variety of insurance and wellbeing benefits.

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