

## JOB DESCRIPTION

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| <b>Name:</b> Vacant                      | <b>Role Title:</b> Investment Analyst, Public Markets |
| <b>Line Manager Name:</b> James Beaumont | <b>Line Manager Title:</b> Head of Public Markets     |

### Purpose

The Investment Analyst within the Public Markets team, will play a valued role in supporting the monitoring, development and delivery of London CIV's listed markets investment offering.

With the transition to pooling, we oversee 33 public market portfolios on behalf of our Partner Funds, alongside managing existing pooled funds and developing new funds. This is a period of significant change and growth, offering an exciting opportunity to join a developing team with plenty of scope to contribute and progress.

As part of a small and collaborative team, the ideal candidate will bring curiosity, strong analytical skills and a proactive work ethic. You will get the opportunity to support our investment, risk management, fund and manager monitoring and client servicing processes. You will also 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

- Support Portfolio Managers in monitoring public markets funds and portfolios. Attend meetings with external Investment Managers, contribute to manager assessments and write-ups, and assist with the preparation of reports and presentation materials for Partner Funds
- Contribute to the production of investment reports by providing clear, accurate and timely analysis including generating narrative input into reports and presentational materials prepared for our Partner Fund investors
- Support Portfolio Managers by contributing to public markets product development, assisting with investment manager reviews, contribute to the construction of model portfolios, and helping with the onboarding process for new investors
- Support the maintenance and/or enhancement of dashboards and other reports summarising performance and risk metrics, and key portfolio characteristics. Key metrics will also include ESG and climate data, and will be used by internal committees and Board level sub-committees. Developing, enhancing and maintaining these dashboards will be an important part of the role
- Build working knowledge of systems used by the investment team and assist in improving processes across Public Markets.

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.

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.

## Key Skills and Experience

### Essential

- Relevant degree in Finance, Economics or a related field
- Experience in Financial Services and strong interest in developing a career in public markets
- Excellent analytical and numerical skills, with advanced Microsoft Office skills, particularly Excel
- Strong organisational skills and attention to detail
- Ability to work independently and collaboratively
- Clear written and verbal communication skills
- 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

- Experience with PowerBI and Coding capabilities
- Familiarity with implementing and using risk management systems and platforms such as eVestment
- Experience preparing reports for Committees or clients
- Experience supporting the preparation of presentations

## 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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