



Example of Equity Research Job Description

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Our company is growing rapidly and is hiring for an equity research. Please review the list of responsibilities and qualifications. While this is our ideal list, we will consider candidates that do not necessarily have all of the qualifications, but have sufficient experience and talent.

Responsibilities for equity research

- Update and maintain financial models
- Write a variety of research reports like initiation reports, sector reports, maintenance reports, reviews, previews
- Carry out sector analysis and come up with investment themes /ideas
- Keep a track of latest developments in the companies under coverage and the sector and incorporate these into the research publications
- Prepare and maintain detailed financial models (including valuations)
- Collate quality information from databases (such as Bloomberg, Datastream and Factiva) and other appropriate sources
- Have 8 years' sell-side equity research experience (preferred)
- Have strong quantitative backgrounds (may have credentials such as the CFA, ACA or CPA)
- Make investment recommendations and manage a sector focus list of 18 to 20 equities for advisor and client use
- Write insightful and timely company-specific and thematic daily commentaries and reports that showcase sector expertise, providing opinions and action-oriented ideas for advisors and clients

Qualifications for equity research

- Excel/VBA programming experience a plus
- Proven ability to develop, nurture and monetize "trusted advisor" client

- Proven track record in revenue generation and entrepreneurial nature (CRM roles)
- Strong quantitative, financial modeling and Excel skills
- Understand or ability to learn about financial modeling and accounting principles
- Experience in Utilities/Clean Tech is preferred