



Example of Senior Analyst, Investment Job Description

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Our company is looking for a senior analyst, investment. To join our growing team, please review the list of responsibilities and qualifications.

Responsibilities for senior analyst, investment

- Collaborates with the PMs to identify key characteristics by asset class and to develop screening tools for efficient and effective evaluation of investment opportunities
- Collaborates with the Investment Analyst to conduct specific asset class research (e.g., portfolio construction, performance, risk exposure,), evaluate alternative approaches, identify improvement areas, and develop documented recommendations
- Implements reporting schedules to satisfy individual asset class reporting obligations in a timely manner
- Serves as a primary resource to the business for consultant and third party database function and related information
- Responds to standard and complex ad-hoc inquiries initiated by internal and external contacts
- Validates/confirms accuracy of data prior to sending to clients
- Develops, maintains and updates job aids for department processes and team workflow tools on an ongoing basis
- Continuously examines processes in order to increase efficiency
- Participates in the training of other associates
- Builds strong relationships with key project stakeholders and effectively incorporates stakeholder needs into a plan

Qualifications for senior analyst, investment

- Line management experience of 1 or 2 staff necessary
- Experience of data management, with the ability to query large volumes of data in order to quickly identify issues
- An understanding of Solvency II reporting requirements is advantageous but not essential
- Good knowledge of respective local and international regulatory requirements (UCITS, AIFMD, SEC)