

Job Title: Fund Research Analyst – Full Time

Background:

Peritus Investment Consultancy is an independent consultant providing wealth guidance services for high net worth individuals and trusts along the investment consultancy model.

The firm's continued expansion has resulted in the creation of a full time role of Manager Fund/Research Analyst.

Role Description:

To research and recommend a robust cross section of Global Discretionary and Fund Managers capable of exceeding the needs of the client base.

Principal Functions

Manager Research:

- Qualitative and quantitative analysis of external fund managers.
- Conduct due diligence on external fund/investment managers and recommend new managers to the Investment Committee.
- Pro-active dialogue and regular meetings with approved managers our clients are invested in.
- Regular monitoring and reporting on managers.
- Reviews of client accounts.
- Research projects in various topics such as asset allocation, different asset classes among others.
- Continuously seek to improve the firm's investment and other processes.

Other:

- Willingness to get involved in operational tasks such as reporting, database management, preparing for client meetings and internal Investment Committee meetings.
- Meet with existing and prospective clients.
- Write research papers on various topics for publications provided to clients.

Minimum Requirements

- Excellent command of written and spoken English
- University degree or relevant qualifications such as , e.g. CAIA, CFA, CIPM, CISI
- 3 - 5 years of experience in investment manager/fund analysis
- Knowledge of global investment managers
- Experience with Morningstar
- Exposure to a small team environment
- Willingness to travel

Personal Qualities

- Intellectually curious
- Willing and eager to learn
- Passionate about investing
- Positive attitude and an ability to handle setbacks
- Highly motivated
- Strong ethics and integrity
- Self-starter with an ability to work independently without constantly being monitored

Compensation

Annual remuneration will comprise a fixed salary in line with the candidate's qualifications, experience and professional expertise.

Location

The company offices are located in Zurich.

Please complete the questions below and separately in your cover letter tell us why not hiring you, would be the biggest mistake of our professional lives.

Thank you

1. What percentage of your day is spent on manager research?
 2. Tell us about three books that have impacted you the most and why? Please provide a short 1-2 paragraph answer on each book.
 3. Which investment manager do you think highly of and why? Please provide a 1-2 paragraph answer.
- Who has had the most significant impact on your investment philosophy and why? Please provide a 1-2 paragraph answer.