

JOB DESCRIPTION

JOB TITLE: INVESTMENT MANAGER ANALYST – GLOBAL EQUITIES

REPORTING TO: MANAGING DIRECTOR

BACKGROUND:

Peritus Investment Consultancy is an independent wealth advisor 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 dedicated role of Global Equity Investment Manager Analyst.

ROLE DESCRIPTION:

To research and recommend a robust cross section of Global Equity and Global Emerging Market Equity Investment Managers capable of exceeding the needs of the client base.

PRINCIPAL FUNCTIONS:

Manager Research:

- Quantitative - Analyse and Select Managers
- Qualitative - High level review of potential managers
- Qualitative - Dispatch, maintenance and review of Questionnaires
- Qualitative - Pro-active dialogue with Core and Prospective Institutions
- Qualitative - Interview and assess new Managers using proprietary process
- Qualitative - Maintain monthly profile of core managers
- Qualitative - Regular visits and manager interviews
- Update asset allocation profiles Core / Potential Managers
- Review risk limits and targets for managers
- Maintain ongoing dialogue with marketplace for market sensitive information

Functional Work:

- Maintain and enhance CRM Database
- Produce Manager reports and fact sheets
- Assist in the preparation for client meetings

Marketing and Communication:

- Enhance literature, training materials and general information
- Meet Clients on relevant visits
- Support Executive Officers in their awareness and education on managers
- Present on Individual Managers



- Produce research articles for relevant media

Ongoing Projects:

- Refine Selection Methodology in conjunction with the CIO / CEO and team members
- Refine Policies and Procedures

MINIMUM REQUIREMENTS:

- Excellent command of written and spoken English
- University Degree - Economics or Finance
- Relevant Financial Qualifications, CFA, MSI
- Practical experience analysing investment institutions
- 3 - 5 Years Experience in the Financial Services Industry
- Excellent in depth knowledge of global equity managers
- Desired background - Private Bank - Asset Manager
- Exposure to small team environment
- Willingness to travel

PERSONAL QUALITIES

- Analytical / Forensic Mindset
- Highly motivated
- Strong values of ethics and integrity
- Self starter
- Strong Attention to Detail
- Clear, Concise Communication Skills
- Time Management
- Adaptability
- Open to Development

MANAGEMENT COMPETENCIES

- Technical and Commercial Orientation
- Deliver Professional Excellence
- Team Player

COMPENSATION

Annual remuneration will comprise a fixed salary in line with the candidate's qualifications, experience and professional expertise. Share options will be available in time and candidates who excel themselves and demonstrate skills and qualities wider than the role itself, may have the opportunity to embark on the partnership programme.

Please apply in writing with full CV to:

James Day, Managing Director
Peritus Investment Consultancy
Walchestrass 23, CH - 8006
Zürich, Switzerland

