



## Position Description

**Position Title:** Investment Analyst

**Salary Band:** E (\$75,000 - \$90,000)

**Department:** Investments

**FLSA Status:** Exempt

**Reports To:** Investments Manager or Director

**Supervisory Responsibility:** No

### JOB SUMMARY

Contribute to the strategic and tactical investment management decisions of the Investments department. Support the Manager – Alternative Investments by providing input into decision making regarding current and new portfolio investments. Responsible for participating in fundamental analysis of the macroeconomic environment and portfolio, including individual investment managers and alternative investments.

### DUTIES & RESPONSIBILITIES (\* = ESSENTIAL FUNCTIONS)

1. \*Assist in monitoring and analyzing current and prospective investments at both a portfolio level and manager level, including factor and characteristics analysis, meetings/calls with external investment managers, risk analysis, and performance attribution, for both traditional and alternative investments.
2. \*Conduct market and macroeconomic research to contribute to asset allocation and portfolio construction decisions.
3. \*Prepare and review NEIL, NEIL Overseas, and Cedar Hamilton Board and Committee materials as assigned.
4. \*Contribute to monitoring of IPS and manager guideline compliance and other key controls as identified in NEIL's Practices & Procedures.
5. Work with consultants, vendors, and internal staff on performance reporting, special research projects, and other department needs, as assigned.
6. Provide operational support, such as cash flow management, budget preparation and analysis, policy and procedures review, invoice review, and audit support as assigned.
7. Recommend actions for improving efficiency and effectiveness of Investments processes.
8. Complete other duties as assigned to foster an efficient flow of business.

*All duties to be conducted in accordance with NEIL's Core Values.*

### QUALIFICATIONS

#### *Job Knowledge*

- Working knowledge of Microsoft Office suite (especially Excel)
  - Knowledge of marketable and non-marketable investments permitted under NEIL's Investment Guidelines and Objectives, including fixed income, equities, private assets, real assets, hedge funds, and derivatives (futures, index options)
  - Knowledge of portfolio risk considerations, including, but not limited to, duration, credit risk, equity risk, currency, volatility, and illiquidity
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### *Competencies/Abilities*

- Strong project management skills
- Strong business writing skills
- Intermediate to Advanced quantitative skills, including algebra and statistics
- Ability to analyze data and develop related insights through critical thinking
- Strong attention to detail
- Self-starter who can work in a fast-paced environment
- Ability to organize one's work and prioritize effectively
- Intellectual curiosity
- Ability to work and collaborate effectively in small team environment while working remotely, including verbal and written communication skills

### *Educational Requirements and Experience*

- Bachelor's Degree in related field required. MBA or other relevant graduate degree preferred
- Three years of experience working in an institutional portfolio management environment, high net-worth RIA, family office, or institutional consulting, required
- Completion of Level 1 Chartered Financial Analyst (CFA) program required with expectation to progress toward CFA Charter completion
- Knowledge of Python or database management preferred

### *Physical Requirements*

- Ability to sit/stand for extensive periods of time
  - Ability to use the telephone requiring auditory and verbal senses
  - Ability to use the computer for extensive lengths of time requiring finger dexterity and visual acuity
  - Ability to travel independently by train, plane, or car, occasionally on short notice
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