



ROLE: Investment Analyst, Active Equity

GRADE: B

Date: October 2020

Role	Need to do	Need to know	Values and Behaviours
<p>LGPS Central is looking for an individual who is fascinated by equity investment, with strong communication and analytical skills, who is excited to help extend our product suite to join our Active Equity Investment Team as an Investment Analyst. Based in the Midlands (Wolverhampton or Matlock), the successful candidate will report to the Portfolio Managers in the Active Equity department.</p> <p>You will work with our team the Active Equity Investment department to build a professional, high performing investment function centring on the needs of our Partner fund clients. The role is supporting the Portfolio Managers in implementing the investment philosophy and process, including the ESG/responsible investment focus whilst upholding the risk and compliance policies set by the investment committee. Specific responsibilities of the role include assisting in the analysis and oversight of multi-manager portfolios and direct equity products, research and monitoring of underlying holdings, as well as liaising with external and internal stakeholders. This is a Certified role under the Senior Manager Certification Regime (SMCR) and will require you to comply with the regulatory requirements set out by the FCA.</p> <p><b>Financial</b></p> <ul style="list-style-type: none"> <li>Assisting in managing £500m to £2.5bn across various products</li> </ul>	<ul style="list-style-type: none"> <li>Monitoring of equity sub-funds / investment mandates.</li> <li>Document and ensure that you meet the investment targets of the Partner Funds in respect of those sub-funds and mandates.</li> <li>Under the supervision of the Portfolio Manager integrate, document and maintain the Investment Committee's investment policies applicable to the asset classes / portfolios for which you are responsible, in addition to observing the house policy on Responsible Investment and Engagement.</li> <li>Always manage risk and compliance in accordance with the Company's Risk and Compliance Framework.</li> <li>Run investment mandates in a manner which will deliver value for money for Partner Funds whilst identifying opportunities to improve the risk adjusted returns after charges in your portfolios.</li> <li>Provide documented assurance to the Portfolio Manager that your recommendations are managed within the parameters set in the Prospectus and the IMA, and in accordance with the Company's policies.</li> </ul>	<p><b>Skills/Knowledge/Experience/Competence:</b></p> <ul style="list-style-type: none"> <li>Document adherence to investment process providing proof.</li> <li>Experience of collaborative investment decision making.</li> <li>Demonstrates skill in selecting investments, documenting the rationale for making investments, portfolio construction, and monitoring.</li> <li>Can evaluate performance and risk of investment portfolios objectively.</li> </ul> <p><b>Qualifications</b></p> <ul style="list-style-type: none"> <li>Degree level or equivalent</li> <li>IMC holder</li> <li>CFA charter (or equivalent) -Working towards or willingness to study.</li> <li>This is an SMCR approved role</li> </ul>	<p><b>Values:</b></p> <ul style="list-style-type: none"> <li>We are a great place to work</li> <li>We are Client Focus ed</li> <li>We are Inclusive</li> <li>We are Ambitious</li> </ul> <p><b>Behaviours:</b></p> <ul style="list-style-type: none"> <li>Open, fair and transparent, acting with integrity.</li> <li>Doing the right thing.</li> <li>Honest and trustworthy</li> <li>Empowered in making right decisions</li> <li>Collegiate and Collaborative.</li> <li>Valuing and treating everyone equally.</li> <li>Listening to individual ideas to support growth.</li> <li>Constructively challenging the status</li> </ul>



<p><b>Non-Financial</b></p> <ul style="list-style-type: none"> <li>• Health and Safety</li> <li>• Performance management and reporting</li> </ul> <p><b>Delegated Authority Levels:</b></p> <ul style="list-style-type: none"> <li>• Investment Analyst</li> <li>• Investment Trainee</li> <li>• Other as applicable to role</li> </ul> <p><b>Reports to:</b></p> <ul style="list-style-type: none"> <li>• Portfolio Manager</li> <li>• Senior Portfolio Manager</li> <li>• Investment Director</li> <li>• DCIO / CIO</li> </ul> <p><b>Relationships:</b></p> <ul style="list-style-type: none"> <li>• Delegated external investment managers</li> <li>• Executive Directors/ Board/NEDS/Heads/managers/ staff</li> <li>• Stakeholders and Clients</li> <li>• Third Party System providers</li> </ul>	<ul style="list-style-type: none"> <li>• Contribute to a rigorous culture of high performing, collaborative, research based and responsible investing across the Investment Team.</li> <li>• Be an ambassador for LGPS Central within the investment community, Partner Funds, and with regulators and key stakeholders.</li> <li>• Take ownership of tasks the Portfolio Manager asks you to manage, for example trading analysis, meeting companies, manager selection, transitions, investor relations and strategy development.</li> <li>• Under the direction of the Portfolio Manager deliver a transparent, auditable and repeatable investment process.</li> </ul>		<p>quo. Accountability for results and delivery Friendly, honest and supportive.</p>
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LGPS Central Limited provides an exciting, supportive and family-friendly working environment, and we are committed to helping our people achieve their full potential and a healthy work-life balance. We are an inclusive employer and offer equal opportunities to all regardless of an individual's age, disability, gender identity, marriage or civil partnership, status, pregnancy or maternity, race, religion or belief, sex and sexual orientation. Candidates who declare that they have a disability and who meet the essential criteria for the job will be offered an interview.