



Title: Private Markets Investment Analyst, Real Assets

SUMMARY:

The Investment Analyst works directly with the Real Assets Team as well as with the firm's consultants and other investment professionals to provide investment consulting services to its clients. The Investment Analyst is a member of the Private Markets Real Assets Team. This team is responsible for the development and management of Meketa's infrastructure and natural resources. The Investment Analyst works closely with other investment and research professionals in carrying out the position's duties.

DESIRED EXPERIENCE:

The Investment Analyst is expected to have a high level of general investment knowledge and, ideally (but not necessarily), be familiar with the investment consulting and investment management industries. Additionally, candidates should possess three or more years of relevant investment experience.

The ideal candidate will have experience as an investment analyst with an understanding of private market investments. Experience in real assets, specifically investment manager sourcing and due diligence on primary, secondary investments, and co-investments is preferred.

REQUIRED SKILLS/EXPERIENCE:

- Bachelor's degree required; major in economics, business, or finance preferred
- MBA, CFA charterholder, and/or CAIA Program enrollee (or designee) preferred
- A minimum of three years of relevant investment industry experience required
- Sound understanding of economic and investment theory and practices
- Strong analytical and quantitative skills
- Superior writing, presentation, and communication skills
- Superb computer skills, including facility with Microsoft Office Suite
- Excellent attention to detail
- Ability to gather, organize, coordinate, and interpret data from disparate sources
- Ability to work efficiently and accurately under time pressure and to meet deadlines
- Ability to work independently and to proactively seek new responsibilities
- Ability to work well with employees from other company departments and offices
- Ability to travel periodically, up to 20% of the time.

ESSENTIAL RESPONSIBILITIES:

- Contribute to the performance reporting process for assigned clients
- Assist with the presentation of research and recommendations to our clients
- Meet with and evaluate the capabilities of private market managers in real assets sectors and draft comprehensive notes



- Monitor the performance of existing investments and identify potential areas of concern
- Conduct screening conference calls/meetings with new potential managers to determine if further due diligence is warranted
- Work with senior analysts to help coordinate the manager search process (RFPs, data collection, search document creation, etc.)
- Conduct special research on real assets strategies and opportunities
- Participate in the creation/updating of the firm's white papers, white paper data, and presentations on various private market research topics
- Write client memos that involve manager updates and/or recommendations
- Assume asset class coverage responsibilities as needed
- Fulfill any and all other duties deemed necessary by management

MEASURES OF SUCCESS:

- Accuracy and timeliness of client-related work product
- Ability to use independent judgment and exercise discretion in selecting and evaluating appropriate managers
- Growth in knowledge base, including general investment and economic topics, and client-related issues of strategy and implementation
- Degree to which knowledge is communicated and available to other investment staff
- Ability to proactively identify manager issues in client portfolios that pose causes for concern
- Level of proficiency with investment-related software
- Effectiveness of communication, both verbal and written, in conveying knowledge, eliciting necessary information, and meeting predefined objectives
- Contribution to improvements in the quality of the company's advisory services
- Contribution to improvements in the efficiency of the company's analytical processes and procedures
- Ability to perform essential responsibilities under only general supervision
- Levels of satisfaction of analysts and consultants as users of the Investment Analyst's services

Last Updated: April 2016