



Title: Performance Analyst

Summary:

The Performance Analyst role is a wonderful opportunity to learn about the world of investments in a stimulating and collegial team environment. The PA plays a supporting role to consultants and investment analysts in servicing the firm's institutional clients (e.g. pension funds and endowments.) Over the course of their work, PAs learn a great deal about the investment consulting process, from portfolio asset allocation to investment manager selection and monitoring.

The Performance Analyst is responsible for collecting and synthesizing data to calculate client investment performance, risk statistics, and portfolio exposure over time. We are seeking proactive and detail-oriented individuals with intellectual curiosity, integrity, and strong communication and organization skills.

The Performance Analyst role is an entry-level position (0-2 years of experience.) We encourage employees to continue to grow their economic and investment knowledge by enrolling in the CFA, CIPM, or CAIA programs.

Job Requirements:

- Bachelor's Degree
- Ability to gather, organize, and coordinate data from disparate sources
- Familiarity with financial and statistical concepts
- Facility with spreadsheet programs and word processing software
- Demonstrated skill at analyzing, evaluating, and reviewing quantitative information
- Excellent attention to detail and organized work habits
- Ability to work independently using prudent judgment and to pro-actively seek out new projects

Responsibilities:

- Independently gather, organize, and verify financial data related to client accounts and investment managers and strategies
- Apply knowledge of economic indicators, investment markets, attribution and benchmarks to analysis of investment results
- Maintain and update regularly databases of investment information
- Calculate and verify client-related investment data and statistics
- Produce client-ready data for quarterly and monthly reviews, including reviewing data for accuracy and reasonableness
- Collaborate on the development of internal indices and analytical tools
- Work with Investment Analysts and Consultants with special projects as needed
- Fulfill any and all other duties deemed necessary by management