



Functional Title: Private Markets Analyst

SUMMARY:

The Private Markets Analyst works as a member of the private markets investment team as well as with the firm's consultants and other investment professionals to provide investment consulting services to its clients. The Private Markets Analyst is responsible for assisting with the reporting process for assigned clients, assisting with the presentation of our research and recommendations to clients; assisting with the firm's marketing effort, meeting with and evaluating the capabilities of private market managers, and assisting with special research on private market strategies and opportunities. The primary focus of the position will be on one or more private markets asset classes, including private equity plus private debt, infrastructure, natural resources, and/or real estate.

The Private Markets Analyst position is an experienced, mid-level investment position. The Private Markets Analyst is expected to progressively increase his or her level of knowledge regarding general investment knowledge, the investment consulting and management industry, and firm-specific practices.

The Private Markets Analyst works closely with consultants and other private market investment professionals in carrying out the position's duties. The position reports to the firm's head of private equity research.

DESIRED EXPERIENCE:

The Private Markets Analyst is expected to have a high level of private markets 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 markets investments. Experience in private equity investments, specifically investment manager sourcing and due diligence on primary, secondary investments, and co-investments is required.

REQUIRED SKILLS/EXPERIENCE:

- Bachelor's degree required; major in economics, business, or finance preferred
- MBA, CFA or CAIA charterholder (or program enrollee) preferred
- Three to seven 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:

- Meet with and evaluate the capabilities of private market managers and draft comprehensive notes
- Assist with the completion and presentation of research and recommendations to our internal investment committees and to clients
- 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 private market 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
- Contribute to the performance reporting process for assigned clients
- 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: July 2019