

SENIOR EQUITY ANALYST

General Summary:

- Undertake detailed analysis and accounting and business valuations of listed and unlisted securities using proprietary methodologies with a view to making a long term investment decision in accordance with internal long term investment strategies and philosophy
- Ability to interact with Senior Business Leaders and Company Management
- Must have ability to write quantitative and qualitative investment valuation reports

Reporting Structure:

- Reports to Chief Investment Officer

Duties and Responsibilities:

The scope of the duties detailed below would apply primarily to listed investment.

- Undertake comprehensive evaluation and analysis to ensure that a thorough due diligence is conducted before the firm undertakes an investment into a security on behalf of its client
- Application of Investment Finance principles primarily to Equity Market, however from time to time, this may encompass evaluation of Bonds, or unlisted instruments.
- Involves the use of long term investment valuation skills in accordance with internal proprietary methodologies including:
 - o Ratio Analysis
 - o Detailed financial analysis of financial performance and financial position of the company through evaluation of Balance Sheets, Income

Statement, Cash Flow Statement, and Statement of Changes in Equity

- o Management Interaction at the highest level will be undertaken, therefore the candidate must have exceptional communication and presentation skills
- o Evaluate the impact of changes in macro and micro economic variables and its implications on the risk and return profile of a security
- Ability to evaluate long term history and numerical data issued by companies.
- Ability to conduct quantitative analysis of companies looking at trend line and statistical numbers

Qualifications and Experience:

- Minimum Qualifications:
 - o Honours Level commerce degree in Investment Finance and/or Accountancy and/or Economics
 - o Chartered Financial Analyst - CFA
 - Professional Designation from CFA Institute (USA)
 - o Chartered Accountancy (from recognized Professional Institute)

Experience

Minimum of 5 (five) years post qualification experience within an Investment / Financial Services / Asset Management environment.
Ability to utilise Bloomberg, Advanced Excel, and VBasic Programming Skills.

Location:

Cape Town. South Africa

