



Role specific information

Title	Credit Analyst - Financials
Department	Asset Management – Fixed Income
Report to	Head of Fixed Income
Location	London

The primary purpose of this role

The primary role is to contribute to the success of the active Global Fixed Income portfolios through researching and making investment recommendations across the financial sector whilst putting sustainability at the centre of the investment decision. The research process will incorporate the entire research chain from thematic analysis, industry and sector analysis, credit investment recommendations as well as considering the reporting on financial and impact outcomes.

Key responsibilities

- Thematic analysis – conduct primary research on the underlying investment themes including their scale, growth rates, relevant industries, companies, financial and impact opportunities.
- Investment recommendations – integrate ESG factors deep into the company selection process to identify resilient companies that we can invest in for the longer term as well as the company having positive impacts on sustainable development.
- Monitoring – Once an investment recommendation is made the theme and company must be continually monitored to ensure the team is invested in the right securities at the right levels to deliver long term outperformance.
- Engagement – Identify key areas of potential engagement with their companies and work with team members or individually to deliver change.
- Reporting – Ensure thematic work, recommendations and engagements are recorded in a manner which delivers transparency for our clients. Work with the team to market the fund both in client meetings and through public engagements and marketing literature.
- External – represent the team at client meetings, prospect meetings, company meetings, conferences and public events if required.
- Assist in the producing and presenting of periodic (monthly/quarterly) portfolio management reviews including comprehensive performance attribution, portfolio characteristics analysis and financial market reviews & outlooks.
- Assist in the production of materials and represent the team at asset allocation committee, investment review committee or other relevant committees.
- Provide cover for other members of the desk in their absence.
- Liaise with members of other departments to ensure the smooth running of the business including any ad-hoc requests or projects.
- Assist in any systems initiatives and upgrades to facilitate the improvement of investment processes.
- Assist the Head of Fixed Income in the development and management of any new investment products /portfolios outside of the current investment strategies.
- Ensure you are aware of the risks associated with the processes of the department and the controls used to mitigate those risks. You are further expected to remain proactive in identifying any further risks or controls that may have an impact or bring added benefit or development on our processes from Market events.
- Ensure you have a full understanding of the department Business Continuity Plan, inclusive of your responsibilities, in the event the plan is invoked.

Skills, knowledge and experience

7+ years Credit Analyst with a focus on banking, insurance and other financials. An individual with a focus on bottom up integrated sustainable investment analysis, proven strong analytical skills and a performance based approach with a deep understanding of ESG and Impact preferred.

Relevant degree or equivalent level qualification

CFA or equivalent

Proficient IT skills using Microsoft Products, particularly advanced Excel skills

