

**The individual will assist with the development and execution of investment strategies of Clarien Investments Limited. This includes research and other investment-related support functions necessary for the management of client portfolios and the firm's mutual funds. In addition, the incumbent will assist in the provision of technical sales support to the wider Wealth Management business. This candidate will be expected to fit into a high performing team.**

## Key Job Accountabilities

- Research: Conduct research on economy, financial markets, individual securities, mutual fund, third party money managers, alternative investments etc.
- Investment Monitoring: Assist in preparing quarterly mutual fund reports and providing input for the content enhancement.
- Financial Modeling: Assist in building and maintaining financial models, risk management, performance attribution, and peer analysis.
- Portfolio monitoring: Coordinate ongoing monitoring of portfolio strategies and performance report generation.
- Trading: Daily processing of trade executions and follow up, act as a liaison with the trading desk.
- Proposal generation: develop and maintain standardized proposals and presentations for clients and prospective clients, including draft investor policy statements.
- Operational responsibilities: respond to client queries, coordinate portfolio reviews, query clients for updated information before review meetings, assist in the development of client communications.
- Assist with ad-hoc functions of the investment management division, as required.

## Key Job Requirements

- University degree in business, economics or equivalent work experience in the financial services industry.
- Minimum of 2-3 years of relevant professional experience in portfolio management, investment analysis, or wealth management.
- CFA charter holder or candidate in CFA program or similar designation.
- Strong analytical skills, good organizational and administrative capabilities, and excellent oral and written communication skills.
- General understanding of financial markets.
- Demonstrated ability to establish positive relationships and inspire trust in others.
- Able to work with minimum supervision and highly motivated.

Clarien is an equal opportunity employer and offers a competitive compensation package commensurate with qualifications and experience. *Please submit a detailed cover letter and resumé no later than October 7, 2025 to: Email: [jobs@clarienbank.com](mailto:jobs@clarienbank.com)*

We sincerely thank all applicants for their interest. Only those candidates under consideration will be contacted. For information on how we process your personal information, please visit our website Privacy Statement at <https://clarienbank.com/privacy-statement>.