

Assistant Investment Analyst

Job Title	Assistant Investment Analyst	Department	Portfolio & Investment Management
Reporting To	Senior Investment Analyst	Document Use	Recruitment, Appraisal, Training

Role Purpose

To support investment analysis, research and portfolio monitoring activities by compiling data, preparing analytical inputs and assisting in due diligence, reporting and documentation for investment decision-making.

1. Strategic Contribution

- Support sound investment decision-making through accurate research and data analysis.
- Contribute to effective investment monitoring and reporting disciplines.
- Assist in maintaining quality investment documentation and evaluation processes.
- Build analytical capability within the investment function.

2. Key Accountabilities

Key Result Area	Core Responsibilities
Investment Research Support	Conduct market, sector, company and financial research to support investment screening, opportunity assessment and portfolio review activities.
Financial Analysis Support	Assist in preparing basic financial models, ratio analysis, valuation support schedules and scenario analysis under supervision.
Portfolio Monitoring	Compile and analyse portfolio performance data, maintain trackers and assist in preparing periodic reports on investment performance, exposures and developments.
Due Diligence Coordination	Support due diligence activities by gathering information, organising documentation, following up on information requests and maintaining transaction files.
Investment Reporting & Documentation	Assist in preparing internal and external reports, investment memoranda, analytical summaries, presentation materials and committee support documentation.
Data Integrity & Process Support	Maintain accurate databases, models, templates and records used by the investment team, ensuring version control and data quality.

3. Qualifications, Experience and Competencies

Education

- Bachelor's degree in Finance, Economics, Accounting, Statistics, Mathematics or a related field.

Professional Certifications (Advantage)

- CFA, ACCA or a similar professional qualification would be an advantage.

Experience

- 1-3 years of relevant experience in investment analysis, corporate finance, research, banking or a related analytical role; strong graduate candidates may also be considered.
- Exposure to financial modelling or portfolio analysis would be an advantage.

Technical Competencies

- Financial statement analysis and ratio interpretation.
- Basic valuation and financial modelling support.
- Research, data compilation and analytical reporting.
- Excel and presentation preparation skills.
- Understanding of investment concepts, markets and portfolio monitoring.

Behavioural and Professional Competencies

- Strong analytical curiosity and attention to detail.
- Discipline in handling data, documentation and deadlines.
- Good written and verbal communication skills.
- Willingness to learn and respond to feedback.
- Professionalism and confidentiality.

4. Key Performance Indicators

Performance Area	Illustrative Measures
Analysis Quality	Accuracy and reliability of research, financial schedules and analytical inputs.
Reporting Support	Timeliness and completeness of portfolio reports, trackers and presentation materials.
Due Diligence Support	Quality and organisation of due diligence files and responsiveness to information requests.
Data Management	Integrity and upkeep of investment data, templates and records.
Development	Progress in analytical capability and ability to handle increasing complexity of work.

5. Additional Requirements

- Willingness to work to tight timelines during transaction or reporting periods.
- Strong commitment to confidentiality and professionalism.

6. Document Control

Prepared / Reviewed By	Approved By
Name: _____ Title: _____ Date: _____	Name: _____ Title: _____ Date: _____