



Role Profile

Portfolio Analyst

Location

Gloucester, GL3 4AH

Contract Type

Permanent / Full-time

Salary

£40,000 DOE

Blackfinch Group is an award-winning investment specialist with a heritage dating back over 25 years. A trusted provider, we work in partnership with advisers. Our businesses offer tax-efficient solutions, early stage investing, managed portfolio services, property financing and renewable energy. As an environmental, social and governance (ESG) investor, we work for a positive impact. We're proud to be entrusted with over £450 million in assets under management and administration.



Purpose of Role

Blackfinch Investments are seeking a candidate with a highly analytical mindset to work alongside the lead Investment Directors. The role will involve fundamental research and analysis of the renewable energy, property and credit markets. The role expands to cover compiling data of our funds and funds of our competitors and managing third party data. The ideal candidate will be able to demonstrate exceptional analytical skills and be confident in the creation of research papers and supporting analysis. You will be confident in interpreting financial metrics and will have the ability to critically analyse other investment reports and research. You will possess strong skills in financial modelling with the ability to justify assumptions made from financial models. You will need to be open minded and have the ability to carry out deep dive reviews and demonstrate a passion for investments in general.

As part of a close-knit team, you will also be expected to assist other members of the team when required and have a willingness to be part of future product developments.

Key Accountabilities

- Identify, analyse and articulate investment ideas for consideration by the investment committee.
- Lead the ongoing investment research and analysis across Blackfinch Investments' range of funds.
- Lead the ongoing modelling and stress testing of the funds.
- Act as lead author on research reports and competitor comparisons, including reviewing and analysing data provided by the wider team.
- Support the Investment Directors with the quantitative and qualitative investment process.
- Develop in-house modelling tools to build on existing investment process.
- Attend, participate and feedback on meetings/conference calls with associated parties.
- Attend and participate in due diligence meetings with existing and potential investors.
- Attend and contribute at regular investment meetings as well.
- Sit on relevant investment committees as required.
- Maintain consistent, up to date knowledge on market developments, market news and new investment products and launches.

Essential Qualifications

- Prepare commentary, statistics and analysis for various marketing and reporting literature.
- Maintain compliant audit trail for investment due diligence.
- Undertake any other duties commensurate with this level of role as requested by either the CEO, CIO or directors.
- Numerate qualification and be educated to degree 2:1 level or equivalent.
- Hold CFA Level 1 qualification and either hold or be prepared to work towards achieving CFA Level 2.

Essential Experience & Skills

- Experience of discretionary portfolio management, fund management or similar
- 3 years+ experience in financial services sector.
- Deep understanding and experience of working in renewables, property and/or credit markets.
- Strong numerical and analytical skills with extensive Excel experience and the ability to adapt easily to new systems.
- Have a minimum of 2 years' experience of using Python, VBA or similar with particular focus on data analysis.
- Have excellent communications skills and ability to present information clearly and concisely including in preparation of research reports.
- Have a keen interest in private and other public market investments and analysis.
- Have a strong and flexible work ethic.
- Legal and operational knowledge of fund structures would be preferable but not essential
- Maintain a resilient attitude.

If you believe you have the skills and experience for this role, we'd be interested to hear from you.

Apply by sending your CV and any other supporting documents to **HR@blackfinch.co.uk**

If you require any further information about this role, we're here to help, contact us on 01452 717070.

Our Values

At Blackfinch we're working to make a difference in the world. We partner with advisers to meet client and business aims. Inspired by the work of Charles Darwin, we're named after one of Darwin's finches, which influenced his theories of evolution.

Our values of 'adapt', 'evolve' and 'thrive' run through everything we do. We continually adapt to changing markets, providing evolved products so that our customers can thrive. These values inform our work as an ESG investor, working towards a more sustainable future.



Offering a supportive environment, championing continuing professional development and sponsoring staff for qualifications.



One of the friendliest businesses in financial services, supporting our people, customers and investee companies.



Providing opportunities to progress plus to take up benefits, and to get involved in sponsorship and charity work
