



Job Ref. No. JAML040

Position: Senior Investment Analyst

Jubilee Asset Management Limited (JAML) is a premier Asset Manager that offers differentiated investment products and solutions across core assets, alternative assets and across all market cycles. Our clients include institutions, high net worth individuals (HNWI) and retail clients. Our differentiated investments products and solutions include Insurance Fund Management, [Segregated Portfolio Management](#), [Unit Trusts](#), Alternative Investments, Offshore Investments and Structured Investment Products. For more information, visit <https://jubileeinsurance.com/ke/asset-management/>.

We currently have an exciting career opportunity for **Senior Investment Analyst** within **Jubilee Asset Management Limited**. The position holder will report to the **Senior Portfolio Manager** and will be based at the Head Office in Nairobi.

Role Purpose

The Senior Investment Analyst will be responsible for conducting in-depth market research, financial analysis, and providing strategic insights for the management of investment portfolios. This role involves both operational and strategic functions, requiring the ability to work cross-functionally within a collaborative culture, contributing to decision-making processes at the highest levels.

Strategy

- Strategic Input: Contribute to the development of long-term investment strategies and goals that align with the company's objectives and the evolving market environment.
- Market Analysis: Provide forward-looking analysis on market conditions and identify emerging trends that can influence investment strategy.
- Client Advisory: Assist in developing tailored investment strategies for key clients, providing insights into risk management and potential growth opportunities.
- Thought Leadership: Present thought leadership on investment trends and strategic shifts to senior management and clients.
- Investment Strategy Development: Lead the development of new investment products and strategies aimed at expanding the company's portfolio and client offerings.
- Benchmarking: Ensure that investment performance benchmarks are continuously evaluated and adjusted to maintain competitiveness.

Operational

- Performance reporting: Prepare and present periodic Client investment performance and macroeconomic outlook reports in line with the Clients' mandates.
- Business development: Prepare investment proposals and macroeconomic outlook reports to support the business development department engage prospective Clients.
- Investment Research and Analysis: Conduct detailed research on equities, fixed income, and other asset classes to support investment decision-making.
- Financial Modeling: Develop and maintain financial models to forecast market trends and evaluate potential investments.
- Portfolio Management: Monitor portfolio performance, assess risk, and propose adjustments to optimize returns in line with the investment strategy.
- Data Collection and Reporting: Gather financial data from various sources, analyze key trends, and present reports to the investment committee and stakeholders.
- Asset Valuation: Perform valuations of investment assets and present findings to senior management and clients.
- Risk Assessment: Analyze market, credit, and liquidity risks associated with different investment strategies.
- Investment Documentation: Prepare and update investment documentation, including investor reports, market updates, and investment strategy proposals.
- Regulatory Compliance: Ensure that all investments comply with relevant regulatory standards and corporate governance practices.
- Client Management: Work closely with institutional and retail clients to understand their investment needs, provide advisory services, and deliver customized investment solutions.
- Support Investment Strategies: Collaborate with the portfolio managers and the broader investment team to implement and monitor investment strategies.

Corporate Governance

- Ensure all investment operations adhere to the company's governance policies, including risk management frameworks, reporting standards, and compliance with regulatory requirements.
- Contribute to the ethical management of investment portfolios, ensuring that all actions reflect the company's integrity and fiduciary responsibilities.
- Work closely with the risk and compliance teams to maintain transparency and accountability in all investment decisions.

People and Culture

- Promote a culture of excellence, collaboration, and ethical investment within the team.
- Encourage knowledge-sharing and continuous learning among team members.
- Support the company's diversity and inclusion initiatives by fostering an inclusive work environment.
- Lead by example by embodying the company's core values in day-to-day operations and strategic thinking.

Key Competencies

- Strong analytical and problem-solving skills.
- Excellent financial modeling and forecasting abilities.
- Deep knowledge of equity and fixed income markets.
- Exceptional communication skills, both written and verbal.
- Ability to work collaboratively in a fast-paced environment.
- Strong attention to detail and adherence to deadlines.

Qualifications

- Bachelor's degree in Finance, Economics, Accounting, or a related field.
- CFA Charter holder or equivalent qualification (preferred).
- Relevant certifications in financial analysis or investment management.

Relevant Experience

- At least 3-4 years of experience in investment analysis, portfolio management, or related roles.
- Experience in managing institutional client relationships.
- Proven track record of conducting investment research and providing actionable insights.
- Strong background in financial modeling, asset valuation, and risk assessment.
- Prior experience working in a regulated financial environment.

**If you are qualified and seeking an exciting new challenge,
please apply via Recruitment@jubileekenya.com quoting the Job Reference Number and
Position by 16th December 2024.
Only Shortlisted Candidates Will Be Contacted.**