



Job Ref. No: JAML046

Position: 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 an **Investment Analyst** within **Jubilee Asset Management Limited**. The position holder will report to the **Senior Portfolio Manager** and will be based at our Head Office.

Role Purpose

The Investment Analyst will play a critical role in driving strategic investment decisions that maximize financial performance and align with the organization's long-term objectives. This position requires expertise in dealership, research analysis, and pricing, contributing to informed decision-making and sustainable growth. The Investment Analyst will collaborate with cross-functional teams, delivering data-driven insights and strategic recommendations while fostering a positive people and culture environment. The role also involves maintaining high standards of corporate governance and ensuring compliance with regulatory requirements.

Key Responsibilities

1. Operational:

- Conduct in-depth research and analysis on market trends, financial data, and investment opportunities.
- Evaluate dealership performance metrics to provide actionable insights for investment decisions.
- Analyze pricing strategies to optimize revenue and profitability.
- Develop and maintain financial models to support investment appraisals and valuations.
- Perform financial forecasting, budgeting, and variance analysis to guide operational decisions.
- Monitor portfolio performance and recommend rebalancing strategies to optimize returns.
- Coordinate with internal teams to ensure efficient investment execution and settlement processes.

- Prepare detailed investment reports, dashboards, and presentations for stakeholders.
- Ensure accurate data collection and maintenance within investment management systems.

2. Strategy:

- Perform scenario analysis and risk assessments to guide strategic decision-making.
- Collaborate with dealership teams to assess and optimize pricing structures.
- Evaluate competitive pricing and market positioning to enhance profitability.
- Provide strategic recommendations to senior management based on investment research and financial analysis.
- Identify emerging investment opportunities and industry trends to inform strategic planning.
- Develop long-term investment strategies aligned with organizational goals and risk tolerance.
- Lead strategic projects, including market entry strategies, mergers, and acquisitions.
- Facilitate strategic discussions and workshops with cross-functional teams to align investment goals.
- Establish key performance indicators (KPIs) to measure the success of investment strategies.

3. Corporate Governance:

- Ensure compliance with regulatory requirements and internal investment policies.
- Maintain accurate and transparent financial records for audit and reporting purposes.
- Adhere to ethical investment practices and uphold the organization's governance standards.
- Conduct regular audits and reviews to ensure investment activities align with governance policies.

4. People and Culture:

- Foster a positive team culture by promoting collaboration, knowledge sharing, and continuous learning.
- Support team development initiatives and contribute to a high-performance work environment.
- Actively participate in mentorship and coaching to enhance team engagement and productivity.
- Champion the organization's values and contribute to an inclusive workplace culture.
- Collaborate with HR and leadership to implement strategies that enhance employee engagement and retention.

Key Competencies and Skills:

- Strategic thinking and problem-solving abilities.
- High attention to detail and accuracy in financial analysis.
- Strong interpersonal skills and a collaborative team-oriented mindset.
- Adaptability and a proactive approach to change management.
- Excellent communication and presentation skills for stakeholder engagement.
- Advanced proficiency in financial modeling and data analysis tools.
- Strong project management skills with the ability to handle multiple priorities.
- In-depth knowledge of investment markets, trends, and regulatory requirements.

Academic Qualifications and Relevant Experience

- Bachelor's degree in Finance, Economics, Business Administration, or related field.
- Professional qualifications (e.g., CFA, ACCA) are an added advantage.
- Minimum of 3 years of experience in investment analysis, dealership, research analysis, and pricing.
- Proficiency in financial modeling, data analysis tools, and investment management software.
- Strong analytical, communication, and presentation skills.

If you are qualified and seeking an exciting new challenge, please apply via recruitment@jubileekenya.com quoting the Job Reference Number and Position by 3rd March 2025

Only shortlisted candidates will be contacted.