



Job Ref. No: JAML061

Position: Investment Dealer

Jubilee Insurance was established in August 1937, as the first locally incorporated Insurance Company based in Mombasa. Jubilee Insurance has spread its sphere of influence throughout the region to become the largest Composite insurer in East Africa, handling Life, Pensions, General and Medical Insurance. Today, Jubilee is the number one insurer in East Africa with over 450,000 clients. Jubilee Insurance has a network of offices in Kenya, Uganda, Tanzania, Burundi. It is the only ISO certified insurance group listed on the three East Africa stock exchanges – The Nairobi Securities Exchange (NSE), Dar es Salaam Stock Exchange and Uganda Securities Exchange. Its regional offices are highly rated on leadership, quality and risk management and have been awarded an AA- in Kenya and Uganda, and an A+ in Tanzania. For more information, visit www.JubileeInsurance.com.

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

Role Purpose

The Investment Dealer plays a key role in executing trades and managing transactions across various financial markets on behalf of Jubilee Asset Management. This role involves monitoring market conditions, executing buy and sell orders, ensuring compliance with trading regulations, and optimizing trade execution strategies. The Investment Dealer works closely with portfolio managers, research analysts, and clients to facilitate efficient trading while minimizing risk and maximizing returns.

Key Responsibilities

1. Trade Execution & Market Monitoring

- Execute buy and sell orders across equities, fixed income, and other investment instruments.
- Monitor financial markets, economic indicators, and industry trends to identify potential trading opportunities.
- Ensure optimal trade execution to minimize costs and maximize portfolio performance.

2. Portfolio Management Support

- Collaborate with portfolio managers to align trading activities with investment strategies.
- Provide real-time market insights to assist in investment decision-making.

- Track portfolio performance and recommend adjustments based on market conditions.

3. Risk Management & Compliance

- Ensure all trading activities comply with regulatory requirements, company policies, and ethical standards.
- Monitor and manage trading risks, including market volatility and liquidity constraints.
- Maintain accurate records of transactions and reporting for audit and compliance purposes.

4. Client & Stakeholder Engagement

- Act as a liaison between clients, brokers, and internal teams to facilitate seamless trade execution.
- Provide market updates, trade confirmations, and investment insights to stakeholders.
- Address client inquiries and ensure a high level of service in all trading activities.

5. Systems & Process Optimization

- Utilize trading platforms and investment management systems for efficient order execution.
- Continuously assess and improve trading strategies and execution processes.
- Stay updated on emerging technologies and tools in financial markets to enhance efficiency.
- Encourage open communication, transparency, and the reporting of any potential compliance concerns or violations, ensuring timely resolution and alignment with company standards.

Key Skills and Competencies

1. **Strong Analytical Skills** – Ability to assess market trends, price movements, and investment opportunities.
2. **Attention to Detail** – Precision in trade execution and transaction record-keeping.
3. **Decision-Making Ability** – Quick thinking in dynamic market conditions to optimize trade outcomes.
4. **Risk Management Skills** – Understanding of financial risks and strategies to mitigate them.
5. **Numerical & Quantitative Proficiency** – Comfort with financial data, pricing models, and trading metrics.
6. **Communication & Negotiation Skills** – Ability to engage with brokers, clients, and internal teams effectively.
7. **Market Awareness** – Strong knowledge of equities, bonds, derivatives, and financial instruments.
8. **Technological Proficiency** – Experience with trading platforms, Bloomberg, Reuters, and portfolio management tools.
9. **Regulatory Knowledge** – Understanding of trading regulations, compliance frameworks, and ethical standards.
10. **Ability to Work Under Pressure** – Handling fast-paced trading environments with precision and confidence.

Academic Qualifications and Relevant Experience

1. Bachelor's degree in Finance, Economics, Business Administration, Actuarial Science, or a related field.
2. Professional certifications such as CFA Level 1, CISI, or ACI Dealing Certificate are an added advantage.
3. Knowledge of financial markets, investment products, and trading regulations is essential.
4. At least 3 years of experience in financial services, asset management, or investment-related roles.

If you are qualified and seeking an exciting new challenge, please apply via recruitment@jubileekenya.com quoting the Job Reference Number and Position by 21st October 2025.

Only shortlisted candidates will be contacted.