Job Ref. No: JLIL 358

Position: Investment Analyst

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 1.9 million clients. Jubilee Insurance has a network of offices in Kenya, Uganda, Tanzania, Burundi, and Mauritius. 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 Analyst** within **Jubilee Life Insurance Limited.** The position holder will report to the **Portfolio Manager** and will be based at our Head Office in Nairobi.

Role Purpose

The role holder will support the Portfolio Manager in managing Jubilee Life's investment portfolios by conducting financial research, market analysis and performance monitoring. The role holder will contribute to data-driven investment decisions, portfolio optimization and regulatory compliance, while collaborating with internal teams to ensure alignment with the company's strategic objectives.

Main Responsibilities

1. **Strategy**

- Conduct in-depth market research and analysis to identify investment opportunities and trends in the Kenyan market.
- Support the development and implementation of investment strategies in line with the company's risk appetite and long-term financial goals.
- Analyze macroeconomic indicators, interest rate movements, and capital market developments to inform investment decisions.
- Evaluate and provide recommendations on investment products and asset classes to support portfolio diversification and performance.
- Assist in preparing periodic investment performance reports for the Portfolio Manager, CFO, and Investment Committee.

2. **Operational**

- Perform financial analysis of potential and existing investments, including valuation modelling, risk assessment, and scenario analysis.
- Conduct due diligence on new investments, reviewing legal documents, financial statements, and assessing associated risks.
- Support the execution of investment strategies, liaising with traders, custodians, and fund managers to ensure timely and accurate transactions.
- Track portfolio performance against benchmarks and report discrepancies or improvement opportunities to the Portfolio Manager.
- Maintain accurate investment records, reconciliations, and documentation for internal and external reporting purposes.
- Collaborate with internal teams (Finance, Actuarial, Risk) to ensure investment activities align with company objectives.

3. Corporate Governance

- Ensure adherence to Jubilee Life's investment policies, internal controls, and regulatory guidelines (Insurance Regulatory Authority, CMA, and other relevant frameworks).
- Support compliance with statutory reporting obligations and maintain audit-ready documentation.
- Stay updated on regulatory changes affecting investments and insurance operations.
- Identify and escalate potential investment risks or governance issues to the Portfolio Manager.

4. People & Culture

- Cross-Functional Collaboration: Actively participate in cross-functional project teams to drive collaboration, innovation, and accountability across departments and the Group.
- Employee Collaboration Index: Participate in a minimum of 2 company projects per year with an 80% success rate and engage in at least 1 Group-wide project per year.
- Skills and Competency Development Index: 100% compliance with your training plan annually to support personal and professional growth, ensuring alignment with career paths and future challenges.
- Cultural Alignment Index (CAI): Attain the Company's CAI target score by embedding Jubilee's values (e.g., innovation, teamwork, excellence) into project execution and team dynamics.
- Conflict Resolution: Address interpersonal or project-related conflicts constructively, maintaining team morale and focus on shared goals.
- Resource Advocacy: Communicate needs (e.g., tools, training, support) to supervisors to ensure personal and team success.

Key Competencies

- Strong investment research and market analysis skills, with the ability to interpret market trends, macroeconomic indicators, and investment opportunities to support portfolio decisions.
- Proficient in financial analysis and modelling, including valuation, scenario analysis, and interpretation of financial statements to assess investment performance.
- Ability to monitor portfolio performance, identify risks or gaps, and provide accurate and timely reports to support decision-making.
- Knowledge of Kenyan regulatory frameworks (IRA, CMA) and internal policies, ensuring compliance and adherence to governance standards.
- Analytical and problem-solving skills, with the ability to interpret complex data, assess risks, and recommend actionable solutions.
- Strong communication and presentation skills to convey investment insights to both technical and non-technical stakeholders effectively.
- Proactive and self-motivated, with the ability to work independently, prioritize tasks, and manage time effectively.
- Attention to detail and accuracy in financial analysis, reporting, and investment documentation.
- Professionalism, ethical integrity, and the ability to maintain confidentiality and fiduciary responsibility.
- Effective collaboration and teamwork skills, working seamlessly with investment, finance, actuarial, and risk teams, contributing to knowledge-sharing and a positive team culture.

Academic Background & Relevant Qualifications

- Bachelor's degree in Finance, Economics, Actuarial Science, Business Administration, or related field.
- Professional certifications such as CFA, CPA, or FRM are highly desirable.
- 3–5 years' experience in investment analysis, asset management, or related roles, preferably within insurance or financial services.
- Proficiency in financial analysis, reporting tools, and Excel; familiarity with Bloomberg, Morningstar, or similar platforms is an advantage.
- Understanding of asset-liability management (ALM) principles and risk-adjusted investment performance is preferred.
- Demonstrated ability to provide insightful, data-driven recommendations to support portfolio optimization.

If you are qualified and seeking an exciting new challenge, please apply via
Recruitment@jubileekenya.com
quoting the Job Reference Number and Position by 30th November 2025.
Only shortlisted candidates will be contacted.