



Job Ref. No: JAML072

Position: Senior 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 450,000 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.

Jubilee Asset Management Limited (JAML) is a wholly owned subsidiary of Jubilee Holdings Limited, with a focus on providing fund management and investment advisory products and services to retail and institutional clients. JAML is licensed as a Fund Manager and regulated by the Capital Markets Authority (CMA) and the Retirement Benefits Authority (RBA).

We currently have an exciting career opportunity for a **Senior 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 **Senior 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. They 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.

Main Responsibilities:

1. Strategy:

- Conduct comprehensive market research and analysis to identify potential investment opportunities and trends in the Kenyan market.
- Develop and implement investment strategies to optimize portfolio performance, taking into account risk tolerance, market conditions, and client objectives.
- Collaborate with the investment team to identify and evaluate new investment products and asset classes that align with the company's overall investment strategy.
- Monitor and evaluate the performance of existing investment portfolios, making recommendations for adjustments and enhancements as needed

2. Operational:

- Perform in-depth financial analysis of investment opportunities, including financial statement analysis, valuation modelling, and risk assessment.
- Conduct due diligence on potential investments, including reviewing legal documents, conducting background checks, and assessing investment risks.
- Prepare investment reports and presentations for internal stakeholders, providing insights and recommendations based on thorough analysis and research.

- Collaborate with portfolio managers, traders, and other internal teams to ensure efficient execution of investment strategies and seamless portfolio management.

3. Corporate Governance (Regulatory and Compliance):

- Ensure compliance with regulatory requirements, including reporting standards, investment guidelines, and industry best practices.
- Stay updated on relevant laws, regulations, and market developments affecting the asset management industry in Kenya.
- Monitor and manage regulatory filings, reporting deadlines, and compliance documentation.
- Conduct regular internal audits to assess compliance with policies and procedures and implement corrective measures when necessary.

4. People and 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:

1. Strong knowledge of financial markets, investment analysis techniques, and asset allocation strategies.
2. Proficient in financial modelling, valuation methods, and investment research tools.
3. Familiarity with Kenyan regulatory frameworks and compliance requirements for the asset management industry.
4. Analytical mindset with strong attention to detail and ability to draw meaningful insights from complex data.
5. Excellent problem-solving and critical thinking skills, with the ability to make informed investment decisions.
6. Strong communication and presentation skills, with the ability to effectively convey investment recommendations to both internal and external stakeholders.
7. Proactive and self-motivated, with the ability to work independently and prioritize tasks effectively.
8. Strong leadership skills, with the ability to motivate and mentor a team of analysts.

Academic Background & Relevant Qualifications:

- Bachelor's Degree in Finance, Economics, or a related field.
- Master's Degree in Finance or a relevant discipline (preferred).
- Professional certifications such as CFA (Chartered Financial Analyst) or CPA (Certified Public Accountant) will be an added advantage.
- Proven experience in investment analysis, asset management, or a related field, preferably in the Kenyan market.

If you are qualified and seeking an exciting new challenge, please apply via Recruitment@jubileekenya.com quoting the Job Reference Number and Position by Friday, 25th January 2026.