



# Investment Analyst I

Salary Group: B22

Class Code: 1130

<u>CLASS TITLE</u>	<u>CLASS CODE</u>	<u>SALARY GROUP</u>	<u>SALARY RANGE</u>
INVESTMENT ANALYST I	1130	B22	\$51,614 - \$84,479
INVESTMENT ANALYST II	1131	B24	\$59,004 - \$96,720
INVESTMENT ANALYST III	1132	B26	\$69,415 - \$117,397
INVESTMENT ANALYST IV	1133	B28	\$83,991 - \$142,052
INVESTMENT ANALYST V	1134	B30	\$101,630 - \$171,881

## GENERAL DESCRIPTION

Performs routine (journey-level) fundamental investment research and analysis work. Work involves conducting investment research and analysis on regions, industries, and companies and making investment recommendations for multiple internal portfolios. Works under moderate supervision, with limited latitude for the use of initiative and independent judgment.

## EXAMPLES OF WORK PERFORMED

Monitors, researches, and analyzes assigned geographic regions, economic sectors, and companies for investment merit and compliance with investment policy quality constraints.

Assists with reports, statistical studies, and presentation materials as needed.

Assists in maintaining documentation supporting investment recommendations.

May recommend security selection and weightings within assigned sectors and regions with support from portfolio managers and senior team members.

May attend industry conferences and make analyst visits.

May prepare reports and coordinate special projects.

Performs related work as assigned.

## GENERAL QUALIFICATION GUIDELINES

### EXPERIENCE AND EDUCATION

Experience in investment research or quantitative analysis work. Graduation from an accredited four-year college or university with major coursework in finance, accounting, mathematics, business administration, or a related field is generally preferred. Experience and education may be substituted for one another.

**KNOWLEDGE, SKILLS, AND ABILITIES**

Knowledge of statistical concepts, methods, and their application to investment research and analysis; of accounting, securities market operations, financial theory, and securities markets; of institutional equity research or investment banking; and of industry standard investment-related software and systems.

Skill in applying investment research techniques and in analyzing and evaluating data.

Ability to apply financial research techniques, to conduct exhaustive searches and evaluations of vast amounts of data, to comply with ethics standards and professional codes of conduct, to work accurately with numerical data, and to communicate effectively.

**REGISTRATION, CERTIFICATION, OR LICENSURE**

May require certification as a Chartered Financial Analyst (CFA).