



# Investment Analyst III

Salary Group: B26

Class Code: 1132

<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
<b>INVESTMENT ANALYST III</b>	<b>1132</b>	<b>B26</b>	<b>\$69,415 - \$117,397</b>
INVESTMENT ANALYST IV	1133	B28	\$83,991 - \$142,052
INVESTMENT ANALYST V	1134	B30	\$101,630 - \$171,881

## GENERAL DESCRIPTION

Performs advanced (senior-level) fundamental investment research and analysis work. Work involves conducting investment research and analyses on regions, industries, and companies; and evaluating investment information such as market operations and conditions. May supervise the work of others. Works under limited supervision, with considerable 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.

Recommends security selection and weightings within assigned sectors and regions.

Attends industry conferences; makes company visits; and maintains contacts within assigned geographic regions, economic sectors, and companies.

Confers with trading staff to ensure best execution of trades.

Maintains documentation supporting investment recommendations and provides written and oral analysis as requested.

Participates in group discussions regarding potential impact on portfolios.

Participates in the evaluation of broker performance for the purpose of allocating trades.

Prepares reports, statistical studies, and presentation materials as needed; and assists senior staff on special projects.

May maintain information database and investment-related systems and software.

May supervise the work of others.

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 develop and maintain research and company contacts, to comply with ethics standards and professional codes of conduct, to work accurately with numerical data, to communicate effectively, and to supervise the work of others.

### **REGISTRATION, CERTIFICATION, OR LICENSURE**

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