



# Investment Analyst V

Salary Group: B30

Class Code: 1134

<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
<b>INVESTMENT ANALYST V</b>	<b>1134</b>	<b>B30</b>	<b>\$101,630 - \$171,881</b>

## GENERAL DESCRIPTION

Performs highly advanced and/or supervisory (senior-level) fundamental investment research and analysis work. Work involves developing strategy for investment of assets and/or monitoring portfolio-level risk; conducting investment research and analysis on regions, industries, and companies; and evaluating investment information such as market operations and conditions. May supervise the work of others. Works under minimal supervision, with extensive 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.

Monitors and analyzes portfolio performance.

Recommends security selection to internal portfolio managers.

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

Participates in meetings with portfolio teams regarding issues affecting assigned geographic regions, economic sectors, and companies.

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

Reviews reports, statistical studies, and presentation materials as needed; and conducts special projects.

May maintain information databases and evaluate organizational system and software needs.

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. Education and experience 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).