

Analyst, Portfolio Analytics & Reporting

Reporting to the Vice President, Client Services, this mid-office client services role works closely with the investment team and is responsible for performing quarterly and annual analysis on infrastructure and private equity portfolios.

Responsibilities:

- Monitors investment activity, performance benchmarking and exposure analysis of investments in infrastructure and private equity partnerships as well as individual assets and companies
- Gathers individual asset and company information from external sources, analyzes and synthesizes data and commentary to prepare client deliverables including quarterly reports, annual presentations, etc.
- Performs quantitative and qualitative analysis using infrastructure and private equity market statistics and benchmark data
- Leads projects to address client requests and leads research and analysis for underlying fund amendments or extensions

Qualifications

- Bachelor's degree in commerce, finance, business administration or economics; strong academic record
- 2+ years of infrastructure, private equity or relevant related experience in a mid- or back-office role monitoring investment activity, performance benchmarking and exposure analysis
- Experience gathering, analyzing and synthesizing data and preparing quarterly reports, annual presentations, etc.
- Working knowledge of financial accounting
- Highly proficient in Excel with advanced abilities in Word and PowerPoint applications with an understanding of PowerBi preferred
- Exceptional written and oral communication skills, intellectual agility and the ability to manage multiple workstreams simultaneously
- Well-developed qualitative and quantitative analytical skills; demonstrated strong modeling skills

Further, you are an ambitious self-starter, a solid team player with a positive attitude and possess high professional and ethical standards. You endeavour to perform work beyond what is required at your level and are willing to "roll up your sleeves" in an entrepreneurial environment to get work done as necessary. You have a demonstrated ability to be resourceful and persistent in gathering and assessing information and to quickly assimilate knowledge.

Goffredo Consulting Group has been retained to conduct this search. If qualified and interested, please submit your resume and cover letter directly to resumes@goffredoconsulting.com