

# Analytics and Reporting Analyst

## Toronto, Ontario

*CBRE Caledon is a leading infrastructure and private equity manager and solutions provider whose business model is to enable investors to access well diversified portfolios of infrastructure and private equity assets utilizing the same approach as the world's leading institutional investors. The Firm currently provides services through pooled vehicles and customized separately managed accounts and creates long-term value for clients by managing high-quality investments and building comprehensive portfolios. Today CBRE Caledon's dedicated team of 50+ professionals in Toronto, New York, and London represents over \$10 billion on behalf of institutional investors globally.*

### THE ROLE

The Analytics and Reporting Analyst supports the Firm with data and portfolio analytics and reporting required for internal business units and management reporting and works in conjunction with internal teams at CBRE Global Investors. The Analyst provides analytical and organizational support to the Business Development, Client Services, and Investments teams to manage private infrastructure and private equity portfolios.

### RESPONSIBILITIES

- Provides analytical and organizational support to internal teams in the management of private infrastructure and private equity portfolios, including responding to ad-hoc requests, attribution analysis, monitoring and maintenance of industry benchmarks, performance calculations, preparing data for marketing materials, and participating in the preparation of client reports
- Gathers, analyzes, interprets and provides multiple datapoints (AUM, Capital Raise, Capital Deployed, IRR) for internal reporting
- Facilitates quarterly management reporting by tracking, compiling, and forecasting firm-level metrics
- Provides quarterly reporting metrics per client and product to the Firm's Management Committee and CBRE Global Investors
- Assists in tracking, reporting, and compiling information for the monthly transaction pipeline for the Firm's Management Committee and CBRE Global Investors
- Compiles information regarding firm assets and various metrics for ad-hoc surveys and questionnaires
- Demonstrates quality control, thoughtful analysis, governance, and transparency
- Assists with Salesforce platform management, including maintaining dashboards, content, tracking, closings, and investor pipeline

### QUALIFICATIONS

- 1-2 years of prior experience in the investment industry conducting reporting or business analysis activities with knowledge of private markets (infrastructure or private equity preferred) or related experience in accounting or data science; recent graduates will be considered and need to have the same relevant experience during summer internships or co-op terms
- Undergraduate degree in Statistics, Data Science, Computer Science, Information Management, Economics, Mathematics, Accounting or Finance, with a strong academic record; recent graduates, please provide a transcript
- Solid knowledge of financial reporting and analytical techniques; proven ability to collect, interpret, extract, organize, analyze, disseminate and apply significant amounts of information and complex data with attention to detail and accuracy
- Knowledge of tools to query and manipulate data, including Power BI, advanced Excel and SQL databases
- Advanced knowledge of financial terms and principles; experience conducting advanced analysis
- The ability to calculate intermediate figures such as time-weighted returns, internal rates of returns, and review trends is an asset
- Proven exceptional written and oral communication skills, intellectual agility, and the ability to manage multiple workstreams simultaneously; Adept at queries, report writing and presenting finds
- Highly proficient in Power BI, Excel, Word and PowerPoint; knowledge of database creation and management

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 demonstrated the ability to be innovative and persistent of gathering and evaluating information and quickly assimilate knowledge.

We value the strengths and contributions of our diverse workforce and offer continuous learning opportunities, giving our staff the flexibility to grow in their careers while enjoying a fast-paced, collaborative working environment.

**Goffredo Consulting Group has been retained to conduct this search. If you have the qualifications for this role, please submit your resume and cover letter directly to [resumes@goffredoconsulting.com](mailto:resumes@goffredoconsulting.com) If you are a recent graduate, please include a copy of your transcripts.**

