



FINANCE ASSOCIATION
INVESTMENT TEAM

Position Descriptions

Research Analyst

Research Analysts conduct research on their designated industry as well as specific companies within that industry. Analysts will work alongside their group to create investment presentations, generate ideas, and discover investment opportunities through their research.

An analyst will be expected to perform the following duties throughout the semester:

Conduct research on the market and designated industry.

Use available resources to facilitate research.

Contribute towards making investment presentations and memos.

Generate investment ideas and communicate them to the group.

Attend and actively participate in all team meetings.

Seek new sources of information.

Pursue learning *outside* of investment team meetings and R&T workshops.

An ideal candidate will:

- Be a self-starter
- Be an active member of the Finance Association during the semester
- Be proficient in Microsoft Excel
- Be proficient in financial accounting fundamentals
- Demonstrate genuine interest in investment finance
- Have some experience working in a team

Portfolio Manager

A portfolio manager manages a small group consisting of themselves and two research analysts. A portfolio manager's main purpose is to lead their group in generating ideas, creating investment presentations, and conducting research. Managers will be expected to seek input from their analysts throughout the investment process.

A manager will be expected to perform the following duties throughout the semester:

Generate ideas for investment opportunities.

Clearly state group goals and expectations.

Contribute to and quality check investment presentations/memos.

Distribute responsibilities within sector group.

Be aware of available resources to aid research process and find opportunities.

Must be aware of market conditions and be up to date on current events.

An ideal candidate will:

- Have some leadership experience
- Be a self-starter
- Be an active member of the Finance Association during the semester
- Be proficient in Microsoft Excel
- Be proficient in financial accounting fundamentals
- Demonstrate genuine interest in investment finance