

Job Description

Job Title: Investment Analyst - High Yield Credit
Reports To: Portfolio Manager – High Yield Credit
Department: Fixed Income
Division: Investments Investments

Pay Range: INV06
FLSA Status: Exempt

SUMMARY: This position will perform fundamental industry and company analysis on assigned sectors in order to develop and maintain sound investment opinions concerning areas of responsibility. The analyst will monitor securities held in the High Yield Portfolio and make purchase and sale recommendations to the High Yield Portfolio Manager.

ESSENTIAL FUNCTIONS:

1. Conducts thorough research of issuers in assigned sectors to understand key drivers of performance and risk.
2. Maintains sound investment opinions of relative valuations of securities and assigned sectors.
3. Monitors performance and risk of securities in assigned sectors.
4. Develops tools and processes to analyze individual securities or portfolios.
5. Assists the High Yield Portfolio Manager with sector allocation decisions based on relative value assessment of assigned sectors.
6. Maintains positive relationships with company management, rating agencies, sell-side analysts, and other key contacts to evaluate current and future company performance.
7. Attends industry and/or company due diligence meetings, if warranted.
8. Specializes in covered sectors, providing industry expertise to others within the Global Bonds department.
9. Builds and maintains working relationships with other investment professionals in the Investment Division to share ideas and information on industries and companies jointly covered.
10. Performs other duties as assigned.

KNOWLEDGE, SKILLS, AND ABILITIES TO PERFORM ESSENTIAL FUNCTIONS*

Education

• High school diploma or GED	• ☒ Required	
• Bachelors in related field	• ☒ Required	☐ Preferred
• Master's Degree	• ☐ Required	☒ Preferred

☐ Direct relevant experience can be substituted for education (if applicable)

• Choose Experience Level

Qualifications

• Strong organizational skills	• ☒ Required	☐ Preferred
• Ability to work independently with minimal direction	• ☒ Required	☐ Preferred
• Ability to react quickly in stressful situations	• ☒ Required	☐ Preferred
• Ability to effectively corroborate in group settings	• ☒ Required	☐ Preferred
• Ability to troubleshoot and problem solve independently with limited standardization	• ☒ Required	☐ Preferred

Experience

• Minimum 3 years of investment experience	• ☒ Required	☐ Preferred
• Intermediate to advance knowledge of MS	• ☒ Required	☐ Preferred

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Windows operating system; MS Word; MS Excel, Internet Web Browsers (e.g. Edge or Chrome) and MS Outlook (internal email systems)	
• Bloomberg experience	• ☐ Required ☒ Preferred
• Aladdin experience	• ☐ Required ☒ Preferred

Certifications/Licenses

• Chartered Financial Analyst (CFA) or progress towards completion strongly desired	• ☐ Required ☒ Preferred
• Registration and licensure with the State of Ohio Security Commission. Within six months of hire, the candidate must meet the eligibility requirements to be licensed as a State Retirement System Investment Officer (SRSIO), which requires either: 1. Having achieved a passing score on one of the following: a. Series 63 exam administered by the Financial Industry Regulatory Authority (FINRA) b. Series 65 c. Series 66 d. Level One of the Chartered Financial Analyst designation, or 2. Earning and being in good standing with the organization that issues any of the following credentials: a. Chartered Financial Analyst b. Chartered Financial Consultant, c. Chartered Investment Counselor d. Certified Public Accountant with a personal financial specialist designation	• ☒ Required ☐ Preferred

Physical Requirements* (if applicable)

• Select Physical Requirement
• Other:

***Reasonable accommodations may be made to enable individuals with disability to perform the essential functions. If repetitive physical movement is required to perform the essential functions of the position, please discuss with HR**

DISCLAIMER: The above statements are not intended to be construed as an exhaustive list of all duties, skills and responsibilities required.