



PORTFOLIO AND RESEARCH ANALYST

Key Responsibilities Include:

- Prepare macro-economic research, updating economic indicators, providing recommendations to the Investment Strategy Committee with respect to economic cycles, geographic and sector allocations.
- Maintain database for sector/regional allocations for equity securities to keep diagnostic software current.
- Act as liaison between valuation and portfolio management groups, maximizing utilization of Portia system to provide timely valuations and analytic reports.
- Liaise with fund administrator to verify BIAS' mutual funds weekly NAV.
- Prepare weekly performance attribution analysis for all discretionary portfolios, advising portfolio managers as to where attribution has enhanced or undermined performances.
- Maintain long term performance data for marketing purposes.
- Execute securities transactions in a timely and efficient manner.
- Document client instructions and communications in BIAS' Client Management System.
- Perform all routine customer service including checking activity, answering enquiries, and fulfilling other client requests.
- Assist in the preparation of various briefing materials and proposals, participating in client meetings.
- Complete performance tables for publication.

Educational and Work Requirements: -

- A degree in Finance, Economics, or Commerce
- Internationally recognized qualifications such as Series 7, Canadian Securities Course with the CSC Conduct and Practices Handbook or CFA Level II pass.
- Experience in investment performance measurement including performance attribution and NAV calculations with a minimum of three years' experience in the collection and management of economic and financial data.
- Competency in quantitative analysis and financial modelling.
- The organizational and time management skills necessary for meeting critical deadlines.
- Strong written and verbal skills with the ability to prepare well-reasoned analytical reports in accordance with established disciplines
- Excellent PC skills particularly with respect to Excel, and other Microsoft Office Software programmes. Portia, Goldmine, and Crystal Reports knowledge would be an asset.

Please submit a detailed resume to:

Human Resources, Bermuda Investment Advisory Services Limited

Wessex House, 2nd Floor, 45 Reid Street,

Hamilton HM 12, Bermuda

or email: [**hrrecruiting@bias.bm**](mailto:hrrecruiting@bias.bm)

Closing Date: March 20, 2020

BIAS is an Equal Opportunity Employer

Licensed to conduct investment business by the
Bermuda Monetary Authority