



Job Title:	Investment Performance Analyst
Department:	Performance, Analytics & Risk
Reports to:	Chief Administrative Officer
Direct Reports:	None
Date:	February 2021

Summary:

This position is primarily responsible for fulfilling periodic and ad-hoc reporting needs, which include portfolio analytics requests, performance, fundamental characteristics, and attribution. Also responsible for fulfilling RFP/Questionnaires requests for performance data. In addition, this role would be expected to cross-train across other functions across the PAR team, and assist on other related projects as needed.

Duties and Responsibilities: The following duties are generally representative of the nature and level of work assigned and are not necessarily all inclusive.

- Produce daily, weekly, monthly and quarterly performance reports and analysis
- Produce timely delivery of client reporting and create custom reports
- Respond to internal ad-hoc requests for data (performance, client, portfolio analytics) from various stakeholders
- Respond to RFPs/RFIs for performance and analytics related data
- Participate in special initiative projects as needed
- Ensure policies and procedures are implemented and documented
- Recommend and implement process changes as needed to increase timely and accurate delivery of performance data

Desired Qualifications:

Education and/or Experience:

- Bachelor's Degree in Economics, Finance, Statistics or equivalent
- Progress towards CIPM, CFA is a plus
- 1 to 4 years' relevant experience
- Knowledge of GIPS and performance measurement concepts
- Experience with FactSet Portfolio Analysis and SPAR is extremely helpful
- Proficient in MS Excel (sort, search, link, pivot tables, formatting, formulas, macros, VB, etc.)
- Microsoft Office Proficiency (Word, Excel, Outlook, Access, Explorer)
- Familiarity in the following programs or systems would be additive: Sylvan, GWP, other accounting portfolio systems, Bloomberg
- Ability to quickly learn new systems and software

Interpersonal/Communication/Language Skills:

- Ability to competently handle multiple projects and/or tasks simultaneously and meet deadlines
- Effective organizational skills; with the ability to focus on details within the context of the overall goals
- Self-starter with motivation to develop new ideas to enhance current procedures
- Strong communication skills; with the ability to explain detailed messages to internal stakeholders
- Able to work independently, and also effectively in a team environment

Mathematical/Analytical/Reasoning Skills:

- Proactive and inquisitive about markets, financial theory, investment management industry

BENEFITS:

- Competitive salary
- 401k plan
- Medical/Dental
- Paid Parking
- Potential for bonus participation

If you meet the qualifications and are interested in the position, please submit resume to recruiting@kayne.com.

A competitive compensation will be offered. Details will be discussed at the appropriate time with interested, qualified candidates.