

JOB DESCRIPTION

Investment Analyst

About UCLA Investment Company:

The UCLA Investment Company was established in 2011 to invest and manage the endowment of the UCLA Foundation. The purpose of the endowment is to support the educational mission of UCLA by providing a reliable source of funds for current and future use. The UCLA Foundation promotes philanthropy and manages resources to advance the campus mission of teaching, research and public service.

Position Overview:

The Investment Analyst will support the mission of the Investment Company by ensuring the endowment is invested in a manner that both (i) provides steady funding for the university, and (ii) preserves the real value. The Investment Analyst will be responsible for (i) data tracking and management, (ii) assisting with the identification, selection and monitoring of external investment managers, (iii) analyzing performance, and (iv) contributing to all other aspects of endowment management. The Investment Analyst will be a generalist and cover multiple strategies in the portfolio, including Public Equity, Hedge Fund, Private Equity, Venture Capital, and Real Assets investments. The Investment Analyst will support and report to the senior investment team. This is a term position, for a minimum of 2 years and a maximum of 3 years. Progress toward obtainment of the CFA designation is expected.

Major Duties:

- **Manager Due Diligence** – playing a key role in the team’s investment and operational due diligence of potential investments, assisting with note taking, composing investment memoranda, and subscription document preparation.
- **Manager Monitoring** – helping oversee existing manager relationships by partaking in regular manager updates and regularly assessing results through performance and attribution analysis, as well as evaluation of underlying investments.
- **Exposure Monitoring** – aggregating, analyzing, and maintaining detailed position-level data for all underlying holdings in manager portfolios across public and private asset classes and producing quarterly geographic, sector, and strategy exposure reporting packages.
- **Portfolio Analysis** – working with the operations and investment team on the critical tools and analysis that support performance assessment and attribution, asset allocation, liquidity management, and risk management.

- **Special Projects** – leading special projects related to various markets, investment strategies, sectors and geographies.
- **Board Reporting** – assisting in the creation and review of regular and ad-hoc materials for The UCLA Investment Company and Foundation Board of Directors.
- **Data Management** – inputting, organizing, and managing data from existing and prospective managers, as well as for various markets, investment strategies, sectors, and geographies, using Bloomberg and various internal applications.

Qualifications:

- Unimpeachable ethics with the highest level of integrity, discretion and commitment
- Minimum of a Bachelor's degree with a track record of outstanding academic achievement
- Progress toward the CFA designation is preferred
- 0 to 3 years of prior work experience in a highly analytical role (applicable roles include asset management, consulting, corporate/project finance, accounting or banking)
- Strong aptitude using Microsoft Excel and working knowledge of financial software packages
- Familiarity with basic financial calculations and statistical concepts, as well as a working understanding of financial statements
- Superior ability for effective time management and meeting deadlines, multi-tasking and working well under pressure
- Superior analytical and quantitative skills, coupled with good judgement and qualitative insight
- Responsiveness, excellent communication and listening skills, with ability to function well as part of a small team
- Ability to take initiative and work independently to drive various projects
- Willingness to travel as needed
- Interest in investing of all sorts

To Apply:

To apply, please submit your resume and cover letter indicating your interest in the role to information@uclainvestments.org with 'UCLA IC Investment Analyst 2021' in the subject heading. Candidates whose qualifications fit the criteria for the job will be contacted.

UCLA Investment Company is an equal opportunity employer and welcomes a diverse candidate pool.