



Investment Performance Analyst

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.

PRIMARY DUTIES AND RESPONSIBILITIES

- 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

QUALIFICATIONS:

- 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 AT KAR

In addition to health insurance, Vacation, PTO benefits and a generous 401(k) company match, KAR is proud to offer its employees benefits:

- Competitive Pay
- Medical, Dental, and Vision Insurance
- Wellness Program
- Tuition Reimbursement
- 24-Hour Employee Assistance Program
- Adoption Assistance
- Paid Family Care Time
- Life and Disability Insurance
- Health Savings Account with a Company Match
- Flexible Spending Accounts including Dependent Care
- Paid Volunteer days

COVID-19 Hiring:

During the pandemic, we have transitioned to a work-from-home environment until further notice. We plan to return to our office when it is safe to do so. Attendance in person at our office will be required at that time.

KAR is an equal opportunity employer. All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, disability, or veteran status.

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

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

For additional general information on Kayne Anderson Rudnick, please access the firm's web site at www.kayne.com.