



Junior Portfolio Analyst

This position is an opportunity to support and become an integral member of Summit Global Investments. You'll work daily with the investment team that currently manages over \$1.5 billion in assets across multiple investment strategies and structures. This team member will have an opportunity to participate in all investment meetings where all portfolio decisions are made. The selected candidate will gain broad exposure and research into various financial instruments including equities, mutual funds, separate accounts, hedge funds, ETFs, Private Capital, etc. This individual will become proficient in compiling, extracting, and analyzing financial data to help create recommendations and SGI's ESG scores from multiple sources. They will also be responsible for generating models, presentations, memos, and summaries with respect to their recommendations.

Responsibilities

- Utilize Bloomberg and Morningstar to conduct research on target industries and companies to provide investment recommendations
- Develop and demonstrate working knowledge of environmental, social, and governance (ESG) factors and assist in analyzing potential new and existing investments.
- Develop and write research reports and publications to be presented to management and/or shareholders
- Create financial models and input data into proprietary financial models to create charts, dashboards and supporting material
- Maintain up-to-date knowledge of financial services industry happenings and current events
- Conduct primary research for ESG sources

Qualifications

- Pursuing a bachelor's degree in Finance, Accounting, Business, Economics, Statistics, or related field
- Strong interest in financial markets
- Highly proficient with Microsoft Office (especially Excel, Word, and PowerPoint)
- Excellent writing skills required
- Detail oriented and comfortable working with various software programs and information systems.
- Programming experience would be helpful
- Interest in obtaining a Chartered Financial Analyst (CFA) designation

Compensation Package

- Competitive Salary – based on experience
- Excellent benefits including medical, dental, vision and supplemental insurance
- Yearly pre-funded HSA account
- 401(k) with match
- Opportunity for bonuses and potential for profit sharing