Job Description

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| **Job Title** | Senior Investment Analyst |
| **Grade** | PO2 |
| **Reporting To** | Head of Pensions – Private Markets |
| **JD Ref** | CSUP |

Purpose

To assist the Director of Pensions and the Head of Private Markets in the provision of a high-performing, well-managed investment management service.

The Senior Investment Analyst will assist in day-to-day management responsibilities for MPF’s non-listed Private Market Funds portfolios. They will be actively involved in private equity, infrastructure, and credit investing, some of which will be via MPF’s commitment to pooled vehicles.

To support the delivery of the Northern LGPS Investment Pool objectives

Main Duties And Responsibilities

**Behavioural:**

* Enjoy, achieve, create impact, and thrive in the role and organisation.
* Live our values in the role and organisation.

**Key Tasks**

* To assist in the management of investments within the internal equity and Alternatives portfolios. Assessing new investment opportunities and monitoring existing investments. Preparing comprehensive investment recommendations for Senior Managers or the Investment Committee with regard to new or existing investments.
* To assist in the monitoring of the external mandates within the equity and fixed income portfolios. This includes communicating with external asset managers on a regular basis, reporting on changes to team or investment process and reporting on performance and portfolio risk.
* Providing relevant data to support the internal managers in negotiating fees/terms for the Alternative investments and Equity/Fixed-income mandates, aimed at producing the most cost-effective outcome for the Fund.
* Contributing to the quarterly strategy and asset allocation meetings with the Fund’s external investment advisers. Assist with the implementation of the Medium-Term Asset Allocation (MTAA) strategy, checking that required derivative trades are placed to align the broad asset classes and currencies with the targets set out by the MTAA panel.
* Assist in developing and maintaining effective Management Information with regard to data on performance, costs and risk.
* Attending Investment Committee meetings, providing constructive appraisal of investment proposals.
* Undertake ad hoc work requested by DoP or Senior Managers.
* Ensure that investment risks are monitored, managed appropriately and reported consistent with mandate guidelines.
* Prepare minutes/reports for the Fund’s Pensions Committee, Pension Board, Investment Monitoring Working Parties, Fund Operating Group and other meetings.
* To carry out any other duties commensurate with the post.

**Key Responsibilities**

**People**

* Assisting in the production of Investment Monitoring Working Party (IMWP) reports.
* Regularly liaising with external asset managers in the Alternatives, Equity and Fixed Income portfolio space, reviewing investment opportunities in the relevant markets.
* Representing the Fund at meetings with investment groups.

**Financial**

* Assist in evaluating the cost/benefits of external financial data providers e.g. Northern Trust, Bloomberg, Thomson Reuters, etc.

**Team Leadership and Management:**

**Communication, Engagement and Training:**

**Strategic**

* Reporting and making recommendations on relevant investment matters e.g. economic developments, political changes and general and specific market/sector dynamics.
* Assist with pooling objectives of the Northern LGPS, including investment process enhancement and sharing of ideas.

**Resources**

* Ensuring compliance with Data Protection, Confidentiality and Information Governance requirements.
* Supporting procurement exercises in respect of investment services for the Fund. Liaising with external consultants/providers and other advisors to ensure compliance with CPRs.

**Planning and Organising**

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| * Provide DoP with dedicated research and analysis on a range of investment related topics in support of the Fund’s strategic objectives, including new policies, legislation and pension initiatives. * Working to deadlines; complying with internal, external and statutory timescales. * Ability to manage time and work schedule within strict deadlines. Regular reports to IMWP, IC and HoPM. |
| * Ability to work flexibly to accommodate the needs of the service. * Undertake and record Continuing Professional Development as required in the Compliance Manual |

**Data Analysis and Decision-Making:**

* Participate in the decision-making process of the Fund’s Investment Committee.

**Compliance:**

* Adhere to and comply with all relevant corporate policies and procedures including Health & Safety, General Data Protection Regulations (GDPR), Corporate Governance and Code of Conduct.
* Ensure that all service initiatives adhere to relevant legislation, policies and practices.

**Other:** Any other duties commensurate with the grade.

Role Specific Knowledge, Experience And Skills

**Qualifications**

* Educated to degree level in a subject requiring a high level of numeracy
* Working knowledge of MS Office Suite, including Excel, Word and PowerPoint.
* FCA Threshold competence qualification

*Desirable*

* Financial services experience
* Working in an office environment

**Knowledge & skills:**

* Knowledge of financial theory acquired through CFA/IMC studies.
* Working knowledge of Bloomberg Terminal.
* Advanced working knowledge of MS Office Suite, including Excel, Word and PowerPoint.

Additional Information

Work hybrid, with a flexible working approach to accommodate service needs.

Expected to work from a fixed location.

On occasion, able to work outside traditional hours, of a weekend and evening as required, adopting a flexible working approach in response to business requirements.

Attendance at meetings in various locations, with regular out of hours meetings and some overnight stays required.

Willingness to travel around the UK and abroad.

Health & Safety Considerations:

* Lone working
* Work with VDUs (Video Display Unit) (>5hrs per week)

Approved By: Adil Manzoor – Head of Private Markets

Date Of Approval: 14-03-2025