
Job Ref. No: JAML007

Position: Investment Analyst

Jubilee Insurance was established in August 1937, as the first locally incorporated Insurance Company based in Mombasa. Jubilee Insurance has spread its sphere of influence throughout the region to become the largest Composite insurer in East Africa, handling Life, Pensions, General and Medical Insurance. Today, Jubilee is the number one insurer in East Africa with over 450,000 clients. Jubilee Insurance has a network of offices in Kenya, Uganda, Tanzania, Burundi, and Mauritius. It is the only ISO certified insurance group listed on the three East Africa stock exchanges – The Nairobi Securities Exchange (NSE), Dar es Salaam Stock Exchange and Uganda Securities Exchange. Its regional offices are highly rated on leadership, quality and risk management and have been awarded an AA- in Kenya and Uganda, and an A+ in Tanzania. For more information, visit www.JubileeInsurance.com.

Jubilee Asset Management Limited (JAML) is a wholly owned subsidiary of Jubilee Holdings Limited, that focuses on providing fund management and investment advisory products and services to institutional and retail clients. It is licensed and regulated by the Capital Markets Authority (CMA).

We currently have an exciting career opportunity for an **Investment Analyst** within **Jubilee Asset Management Limited**. The position holder will report to the **Portfolio Manager** and will be based at our Head Office in Nairobi.

Role Purpose

The investment analyst plays a critical role in conducting research, performing investment analysis, and providing valuable information and recommendations on equity and fixed income investments. This position requires staying updated on macroeconomic trends, monitoring market developments, and tracking corporate actions of listed companies.

Main Responsibilities

Research and Analysis:

1. Conduct extensive research and analysis on potential investment opportunities, including fundamental analysis of financial statements, market trends, industry analysis, and competitor evaluations.
2. Evaluate the risk-return characteristics of investments and assess their suitability for specific portfolios or strategies.
3. Utilize financial models and quantitative techniques to forecast investment performance and assess potential risks.
4. Stay updated with market developments, economic indicators, and regulatory changes that may impact investment decisions.

Investment Due Diligence

1. Perform due diligence on investment opportunities, including conducting background checks, reviewing legal and regulatory documents, and assessing the credibility and financial strength of potential investment partners or issuers.
2. Evaluate investment strategies and assess their alignment with client objectives, risk tolerance, and investment guidelines.
3. Identify and analyze key drivers, trends, and risks within specific industries or sectors that may impact investment performance.
4. Reporting and Communication:
5. Prepare detailed investment reports, investment memos, and presentations to communicate investment recommendations, findings, and performance to portfolio managers, clients, and senior stakeholders.
6. Clearly and effectively communicate complex investment concepts, strategies, and risks to both technical and non-technical audiences.
7. Collaborate with team members to generate investment ideas, discuss research findings, and contribute to investment strategy discussions.

Investment Recommendation

1. Making recommendations regarding investment attractiveness of equities and fixed income securities
2. Transferring relatively complex information to diverse audiences.

Portfolio Monitoring and Performance Evaluation:

1. Monitor and evaluate the performance of existing investments and portfolios, identify areas of improvement, and recommend appropriate actions.
2. Conduct periodic reviews of investment portfolios to ensure compliance with investment guidelines, risk parameters, and regulatory requirements.
3. Assist in the development and implementation of investment strategies, asset allocation models, and risk management frameworks.
4. Market and Competitive Analysis: analyze market trends, economic indicators, geopolitical events, and other factors that may impact investment opportunities.
5. Monitor and assess the competitive landscape within specific industries or sectors to identify potential investment risks and

opportunities.

6. Stay updated with industry research reports, investment publications, and market commentary to gain insights into emerging trends and potential investment themes.
7. Analyzing the position of listed and unlisted companies within the investment universe.
8. Projecting short and long-term macroeconomic forecasts for factors such as GDP, inflation, and interest rates, as well as industry and company specific financial projections, with clearly identifiable performance drivers.

Key Competencies

1. Technical knowledge in Investment
2. Decision Making
3. Planning & Organizing
4. Analytical Skills
5. Ownership & Commitment
6. Highly Numerate

Qualifications

1. Bachelor's degree in Finance/ Investments
2. CFA Qualification will be an added advantage.

Relevant Experience

Minimum of 3 years' work experience in financial modelling and investment analysis.

If you are qualified and seeking an exciting new challenge, please apply via Recruitment@jubileekenya.com quoting the Job Reference Number and Position by 15th June 2023

Only shortlisted candidates will be contacted.