

**Title:** Equity Analyst Research – Small & Mid Cap  
**Department:** Equity

**Summary:**

The Equity Research Analyst will function as a sector specialist, conducting research across multiple industries within Healthcare or other sectors.

**Responsibilities:**

- Conduct comprehensive fundamental analysis of various companies, industries, and sectors including:
  - Analyze industry dynamics and sources of competitive advantage
  - Perform in-depth financial statement analysis
  - Determine and follow key industry and company drivers
  - Evaluate quality of company management and their alignment with our focus on long term value creation for all stakeholders
  - Compare stock valuation to sustainable long term growth rate and intrinsic value of the underlying business
- Identify and present buy/sell investment opportunities, ideas, and opinions to portfolio managers and equity team
- Communicate rationale for portfolio decisions to clients, consultants, traders, and the firm's Investment Committee
- Work collaboratively with equity team to complete work outside of core coverage area and product
- Communicate investment philosophy and process to prospective clients and consultants
- Occasional travel will be necessary to fulfill these responsibilities

**Qualifications:**

- MBA/CFA charter required
- 7+ years of experience on the buy side performing equity analysis; small and mid cap research experience preferred; experience with Healthcare sector preferred
- Experience and preference for working within a deliberate, low turnover investment process
- Experience and a desire to present an equity process and performance results to clients, prospects, and investment consultants at varying levels of financial sophistication
- Natural predisposition to conducting themselves at the highest level of integrity, always putting the clients' interest first
- Strong analytical and organizational skills
- Excellent written and oral communication skills
- Must be a self-starter and able to work independently
- Excellent computer skills using Excel, Factset and Bloomberg