GW&K | INVESTMENT MANAGEMENT

Title: Portfolio Analytics Associate

Summary:

The Portfolio Analytics Associate will work with the Performance and Analytics Group to support the analytical needs of Sales and Client Service. The incumbent will be responsible for managing all requests for analytics on prospective client portfolios, from data input to final review.

Responsibilities:

- Review holdings of prospective client portfolios provided in various formats (fax, email, PDF) and input into a spreadsheet to perform further analysis
- Analyze existing portfolios of prospective clients and compare and contrast them with proposed GW&K strategies
- Utilize Bloomberg, FactSet and Morningstar to properly classify holdings and mutual funds by asset class/type, sector, market capitalization, etc.
- Create proposals illustrating the asset class breakdown and income projections for suggested GW&K strategies
- Monitor and document all incoming requests and respond in a timely fashion.
- Respond to and resolve all follow up inquiries from sales and client service in a timely and professional manner
- Assist the Performance and Analytics group with various special projects and assignments
- Continuously look for ways to enhance outputs and streamline processes and procedures to improve efficiency and accuracy

Qualifications:

- Bachelor’s degree, preferably in business, finance, or economics
- 1-2 years of industry experience
- Must be detail oriented, possess strong organizational skills and work well under pressured time constraints while meeting strict deadlines
- Proficient in Microsoft Office Suite with exceptional working knowledge of Excel
- Strong team orientation but also self-motivated and able to complete projects independently
- Ability to transform financial data and information into a clear format that will enable non-investment audiences to understand the data
- Demonstrated desire to further develop industry and market knowledge